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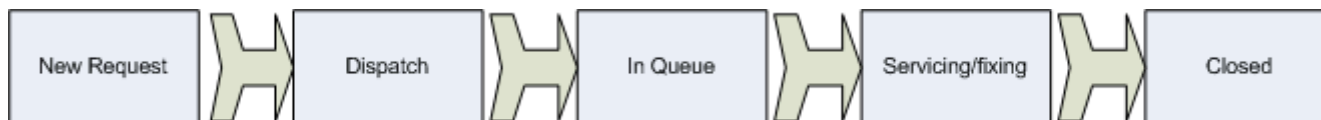
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Help Desks...so why can't we get help?

So why it is that today the helpdesk is derided almost universally, by the people they are there to help? Why that is the help desk has been renamed in many organizations as the 'helpless desk'. Is the culprit the design of the help desk, the management, the tools deployed or is just that the users are beyond any form of help? To answer these questions we first need to review and understand the function, design, and management that are elements of any help desk.

According to PCMag a help desk is defined as "A source of technical support for hardware or software. Help desks are staffed by people who can either solve the problem directly or forward the problem to someone else. Help desk software provides the means to log in problems and track them until solved. It also provides the management information regarding support activities." That sounds simple enough, but as with most things the devil is in the details. Users in most organizations will have 25 or more different software applications on their desktop, other software on their laptop and others yet on their pda. These applications include both company provided and user provided applications. IN addition to the software, they may have a desktop, laptop, pda, printer, scanner and network connections, wired and wireless. As you can see it very quickly becomes a very complicated mash of files, applications, hardware and network elements. Keep the users running is the role of the helpdesk.

IT is the owner of all company sponsored applications, as well as the provider of the network connectivity and hardware, so it is left to IT to manage the help desk and make it as efficient as possible. Of course to the uninitiated this sound fairly straight forward; IT knows the applications, hardware, software and networks after all they selected, purchased, configured and installed each of these elements. In addition the IT group has developed a process to manage help desk inquiries that generally runs as illustrated in the graphic below.



A nice linear process. This is way a help desk is intended to work. Make a request, send it to dispatch, it is assigned a case or ticket number, entered in the queue, dispatch assigns a rep to investigate and respond (fix) the problem and once fixed the case (or ticket) is closed.

Of course few things in life actually work as they were originally designed to. This is certainly true of help desks. Even with the experts who know the technology, its configuration and who are equipped with a logical and straightforward management process, help desks are often hopelessly doomed. Why you may ask? Well with the focus on technology; hardware/software, networks and process one critical element has been omitted, People.

Inside this Issue

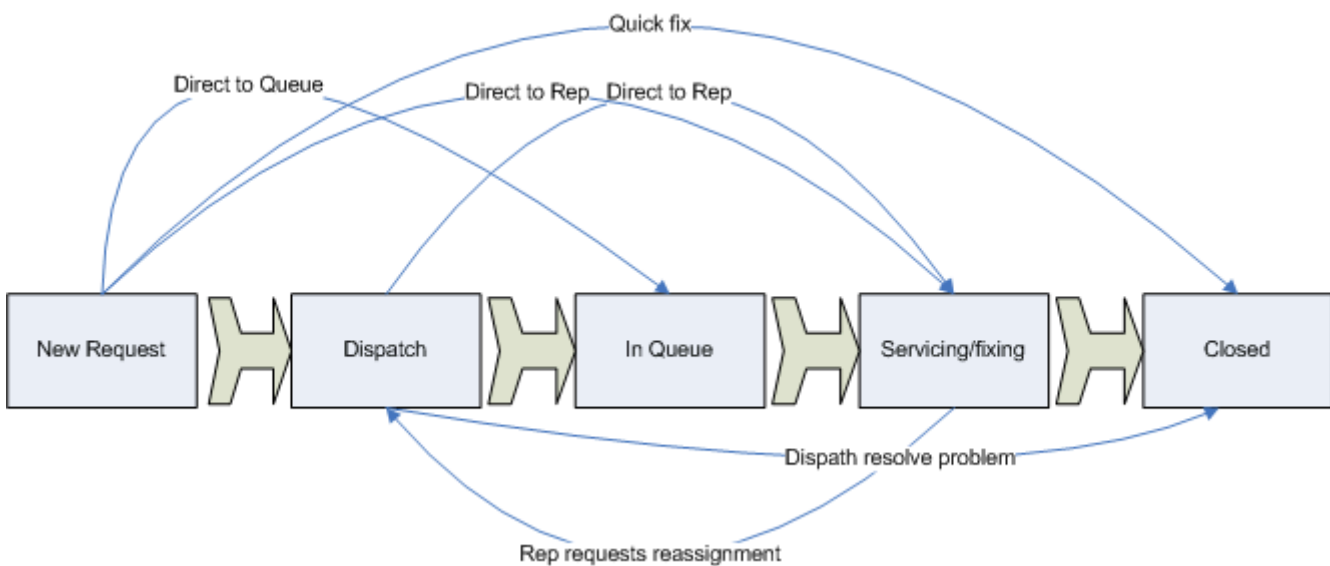
Help Desks...so why can't we get help?	1
Survey of the Month	3
By the Numbers: Contact Center Metrics	3
Research Studies	6
Newsworthy	6
Inside TRG.....	11
Case Study	11



Remember to old adage “to err is human, to really mess things up requires a computer”? We I would suggest that today the inverse is closer to the truth...internet viruses notwithstanding. People and specifically the users tend to be the single largest cause of issues requiring help desk support. Now let me be clear people cause most problems, but they do so often in such ways that we do not see ourselves as the culprit when we have a problem. Let me give you an example, Bob contacts the help desk because one of his Microsoft programs crashed and now will not boot up. He has tried rebooting his pc and has closed all other windows. Bob is in a panic, he needs to get a report done and that can't happen if he can't get the software to load. The help desk responds and even they are stumped at first and need to research the problem. The map all of the programs and applications on Bob's pc. They review all of the files within those applications and finally the ah ha moment. There are two programs that employ a file called “abcd.dll” one in his Microsoft application and one in that new golf game software Bob recently installed to provide some entertainment on those long flights he is required to take. Bob in his haste to install his new game, did what we all do when going through a similar process we click ‘yes’ to any and all ‘replace file x with newer file x’ queries and in doing so Bob replaced the file that was needed to boot his MS file with a snazzy new that works great for golf,, but so good with Word.

We are all Bobs', we all have software application, instant messaging, media players, sound players, games and other goodies on our machines that IT not only doesn't know about, but that they have experience troubleshooting. The result is longer time to research and repair a help desk request. But besides the software we have installed we can create other problems...the virus the came when we opened that joke, the synchronization software for the pda we got for our birthday, the new business card scanner we purchased as an efficiency tool (not knowing we could actually crash the mail server). Face it people are the problem, not intentionally, but we are just the same. People do not view a pc as tool to just do spreadsheet, report writing and presentation preparation and to access the company CRM database, but rather we view computers as tools that can do thousands of wonderful and entertaining thing to inform and entertain us besides doing all of those functions and tasks that IT has designed and equipped them to do. In developing specifications and configurations for our pcs and networks etc. the IT group will ensure that we have compatibility and that the systems will function as designed...but they can't even imaging all of the other things we will try to do with our machines.

So all the havoc wreaked by you and I and Bob has an impact on the help desk. They receive more cases and tickets needing attention than forecast, with more requiring research in order to fix. All the while the user is popping blood vessels wondering how they will get the report to the VP by 2pm. The net result of this becomes longer delays in the help desk queue and a general feeling amongst users that the help desk isn't very helpful. So faced with a 2 pm deadline and the belief that the help desk isn't very helpful, what is a manager to do? What we always do in times of challenge and crisis, we innovate. Remember that neat and tidy linear process we reviewed above? The one that sets out the process of managing a help desk case? Well enterprising users can turn that on its ear very quickly. Have a look at the graphic below which is actually far more accurate of most help desks.



Being innovative we all understand the concept of work-arounds, but in relation to our help desks many of us have become masters of this. We have cultivated relationships with the helpdesk reps individually just so we can by pass the dispatch and queue steps to speed our fix. We discover the secret queue email address and naming convention and try to jam a bogus case into the queue, we butter up the folks who dispatch to seek preferential treatment, we call our buddy asking for 5 minutes on the phone to see if we



can get a quick fix and bypass the whole ugly process. This whole process is often greased by glad-handing, feigned friendship and doughnuts for the Help desk staff. Of course soe help desk staff will try against all logic to actually follow the process they have been instructed to do and forward a work-around request back to dispatch where it gets entered into the queue much later than it originally would have (I guess we know who didn't get the doughnuts). While much of the above is 'tongue in cheek', the activities and work arounds are not.

Now try designing an effective help desk with people who are always and with little if any consideration of the consequences adding 'stuff' onto their computers and a process that often doomed to work-arounds. A daunting task isn't it? Daunting yes, impossible no. To get a handle on your help desk operation you need to get a handle on the primary cause of help desk cases...people. In practice it makes little sense to try to get people to stop adding stuff, because it is unlikely to work. A better approach is to look at what people do add and determine which ones (there is a multitude of choice for most of the add ons we install) and determine the ones that are least likely to cause problems and share this with the users. This sharing process is one of education, there likely will be applications that you will forbid text chat and Voip are two of the most common banned applications, but tell them why; security, hackers, viruses etc. Train your people to ask before they install and not to mindlessly click yes to everything. This should be part of your staff induction training and part of the process whenever anyone gets a new or upgraded machine. This will reduce demand for the help desk are reduce the average time to repair, thereby reducing the queue.

Once you have you people and their pc's under control, or as much control as we can reasonably expect next we need to turn our eye to our help desk staff. Doughnuts aren't good for us anyway so work with your staff to follow the process and be rigorous about it. Set up measures and reports on each of the staff: track mean time to repair, review their tickets/cases and determine what percentage followed the process and call them on it. Of course the senior VP may still get preferred treatment from time to time, but the overall incidence and use of work-arounds and back doors will diminish. This will of course further improve the through put of the help desk and improve their responsiveness both actual and perceived.

The truth of the matter is that most help desk challenges and those that lead us to label the help desk, the helpless desk have much, much less to do with technology and much more to do with people, both within and outside of the help desk.

Let us know what you think of this article send us an email at feedback@thetaylorreachgroup.com

Survey of the Month

Will return next month

By the Numbers: Contact Center Metrics

By Linda Formichelli

If train A leaves Boston at 3:13 p.m. going 75 miles per hour, and train B leaves New York City at 2:24 p.m. going 71 miles per hour, what time will they meet? You probably thought that once you'd graduated from high school you were through with having to solve this sort of problem. But now that you're in charge of a contact center, you may be struggling with math once again. Should you measure the percentage of calls answered in a certain amount of time, the average speed of answer, the abandonment rate, or all of the above? And once you've finally decided, how do you implement those metrics — and how will they affect other aspects of your business, such as staffing? It's high school algebra all over again.

PICKING AND CHOOSING

Deciding which metrics to measure is “the start of some of the greatest errors in the trade,” says John Cockerill, vice president of the Taylor Reach Group, a contact center consultancy in Ajax, Ontario.



Most contact centers measure service level, usually defined as the percentage of calls answered in a certain amount of time. A service level of 80/20 — a common goal for multichannel merchants — means that 80% of calls were answered in 20 seconds or less. While average speed of answer (ASA) and abandonment rate are also important metrics, the service level statistic can give you a good idea of your performance in those related areas.

“Our service level is probably the most comprehensive indicator of all the other ones, so that's the key one we focus on,” says Tena Perrelli, senior customer contact center manager at Burlington, VT-based Gardener's Supply Co. and Dutch Gardens. “When our abandonment rate goes up, service level goes down. The same with call length — if it's not according to what you budgeted it to be, it will negatively affect your service level.”

ASA is widely used, but some experts believe that contact center managers rely too much on this metric. “It's misleading,” says Brad Cleveland, president of the Annapolis, MD-based International Customer Management Institute (ICMI). “It's mathematically correct, but it's skewed.” For example, an impressive-sounding ASA of 15 seconds can conceal a longest wait of an unacceptable three minutes. “For that reason,” Cleveland says, “we don't recommend average speed of answer [as a metric]. It's an alternative if you don't have service level, but service level is better.”

Abandonment rate is another metric that's widely used — but it can be misleading as well. “There's an irony with abandonment,” says Cleveland. “If you have a good service level, you can see abandonment going up in shorter increments of time.” Say you have a consistently good service level, and a customer is waiting on the phone when someone walks into his office. Chances are, he'll bail out on the call, knowing that he can always come back and expect a quick answer. On the other hand, if you're known to have a poor service level, that customer won't hang up no matter what. The result: a low abandonment rate that, ironically, reflects a poor service level.

Another metric to consider is blockage: the number of calls that can't get into your switch because you don't have enough capacity. In fact, says Cockerill, abandonment rate and blockage rate are key components of service level, which gives you a stat like 80/20/3/0 — 80% of calls answered in 20 seconds or less, with 3% abandonment and zero blockage.

In the multichannel environment, you'll also have metrics for two types of nonphone channels: those that require a response as they come in (such as text chat and instant messaging) and those that don't (such as e-mail and postal mail). To gauge performance within the channels that require immediate response, you can use metrics similar to those you use for phone calls. The others require different response metrics and goals, such as 100% of e-mails answered within 24 hours, or 70% of mail answered within two days and 100% answered within four days.

SETTING STANDARDS

So let's say the service-level metric is the most important (though not everyone agrees — see “Counterpoint: why service level isn't an ideal metric,” on page 45), with ASA, abandonment rate, and blockage rate playing supporting roles. The next question: How do you determine what service level to aim for?

It depends on your value proposition to customers. If you differentiate your company based on service, you'll need to back that up with a higher service level, says Cleveland.

In his book *Call Center Management on Fast-Forward: Succeeding in Today's Dynamic Customer Contact Environment*, Cleveland notes that for catalogers that want to be on the high end of the service-level scale, 90/20 (90% of calls answered within 20 seconds), 80/15, and 90/15 are common service-level goals, with abandonment-rate goals of 1%-2%. Service levels of 80/20, 80/30, and 90/60 are considered average and would likely yield an abandonment rate of 3%-4%. A modest service level might be 70/60 or 80/120. These humbler measures are more common in technical support centers and government organizations, where the abandonment rate can be as high as 10%-15%.

And if you target business buyers, your goals may be different than those of a consumer merchant. “The principles are the same, but the difference is that you have different customer criteria that would dictate certain service levels,” says Cleveland. “If your business customers are high-volume purchasers, you want to make sure that your service levels are intact.” That's not to say that



the business segment is more important than the consumer segment; rather, their criteria for what constitutes good service are different, and your service levels need to reflect that.

STRIKING A BALANCE

You say your business is all about service; it's what you promise your customers, and it's what you pride yourself on. So should you overstaff your contact center in order to avoid a single missed or abandoned call — even if doing so will require amazing feats of staffing prowess? In other words, how do you balance your contact center metrics with staffing and cost?

Most consultants and practitioners agree that it's better to aim for a higher service level and be slightly overstaffed than to be understaffed with a lower service level. “We had a consultant here a week ago, and he showed that you can err on the side of being overstaffed, and in most instances the sales you save from not losing calls offsets the sales you lose if you're understaffed. It's pretty dramatic. So we're trying to apply that when we're making cost justifications for increased staffing,” says Gardener's Supply Co.'s Perrelli.

Opting for a lower service level in order to avoid overstaffing can cost you money in another way as well, says Cockerill. If you have a long hold time or a cumbersome interactive voice response (IVR) menu at the front end that takes a long time to navigate through, once the caller finally reaches an agent he will spend time — generally 15-45 seconds, Cockerill says — complaining about how terrible the service is, turning what would have been a short, efficient call into an unacceptably long one. This, in turn, increases the degree of bad service the other callers in the queue will get — which translates into increased costs.

“Most people presume that good service costs more on a sustained basis...but in fact, our evidence shows that it's quite the opposite,” says Cockerill. “Bad service costs you a lot more.”

Of course, there is a limit to how much you'll want to pump up your service level by adding agents. “If your service level is 100%, you're going to be overstaffed,” says Perrelli. “People hang up for lots of reasons, and they will call back depending on their reason. What you want is to not lose calls because people are tired of waiting.”

All these numbers and calculations come down to one thing: keeping customers happy so that they'll buy (and continue to buy) from you. Correct staffing and proper service levels will save you money on overstaffing; at the same time, keeping customers happy will lead to more profits.

Unfortunately, however, the customer often gets lost in the mix of metric numbers. “There's generally a 30% difference between the internal scoring measures vs. the external scoring measures of how well your customers think you're doing,” says Cockerill. “And 99% of the time, they think you're doing worse than your internal scores. That's because we measure what we think is important, not what the customer thinks is important.”

In addition to basing your service levels on industry standards, you should base them on what your customers actually want. According to Cleveland, you can determine your customers' needs by talking to your contact center reps and checking out the competition. “Your front-line agents have a good idea of what customers are expecting and how they're perceiving your service,” he says. “You can also look at what competitors are doing, from calling them to see how they do to conducting a more formal comparison or study.”

Another way is to survey your customers. Scott Schnarr, contact center manager for Huntingburg, IN-based home decor cataloger Touch of Class, sends customers e-mail and postal mail surveys. “We ask them how the experience was, how the wait time was, if they encountered any problems when they called or when they spoke with agents, and if the time they spent with the agent was what they expected,” Schnarr says.

According to Cockerill, typically what's most important to customers is first-call resolution — that is, whether their issue was resolved when they called. “This is probably one of the major metrics that should be measured, and customer satisfaction should be married with that,” he says. “Measure this quarterly or at least every six months by having an independent party conduct after-call surveys to determine what's important to the customer and how the call was. Measure that back against your scores in some form of calibration session so that you can see if you're matching up to your own internal scores.”



While metrics and calculations are important, ultimately you have to have a customer-oriented perspective. “Customers don't care about channels or channel management,” says Cleveland. “What they care about is ‘Hey, give me good service.’”

Concord, NH-based Linda Formichelli has written for Call Center Management Review, Nation's Business, and USA Weekend, among other publications.


TRG is pleased to reproduce this article which was originally published by Multi Channel Merchant. You can view this article on-line at by following this link http://multichannelmerchant.com/opsandfulfillment/contactcenters/numbers_2/

Research Studies

Recent TRG research studies

In “Outsourced Quality Monitoring: *Emerging Market or Outsourcing Core Competency?*” TRG studied more than 160 organizations and their views regarding the outsourcing of quality monitoring. Every Contact Center senior manager knows that agents require coaching, training and guidance to become more effective and more efficient, unfortunately in most organizations Supervisors spend a significant portion of their time completing non-agent related activities. The question becomes how can we improve the supervisors’ efficiency in completing all of their tasks and still ensure we coach and develop our agents.

In “Assessing Outsource, Offshore and Domestic contact center operations”, TRG examines the opportunities and challenges associated with processing live agent voice calls, email and whitemail processing internally and outsourced. In addition the study examines advantages and disadvantages of Domestic near shore and offshore locations.

If you would like to receive a complimentary copy of either of these reports please email your request to info@thetaylorreachgroup.com . 

New Research studies

TRG has partnered with Contact Management magazine and will be offering on-line surveys regularly on topics relevant and of interest to contact center managers and senior staff. Watch in future issues of Contact Management magazine for more information on the surveys. For more information on Contact Management Magazine please follow this link <http://www.contactmanagement.ca>

Newsworthy

In this regular column we review the latest news, predictions and trends impacting on the Call Center / Customer Interaction Industry.

Half of all UK customers prefer human interaction, says report

More than half of customers would rather talk to a person when they call a contact centre than a machine, new research has found.

According to a report by London-based customer insight specialist The Listening Company, half of all UK consumers prefer human interactions to IVR systems — despite businesses increasingly relying on technology.

Long waits (36 per cent) and too many or complicated automated responses (30 per cent) were also found to be far more annoying to people than being passed from department to department or unfriendly staff.

The Listening Company, which surveyed 1,000 consumers from across the UK, also found that basic listening skills is of consistently high importance when buying a product or sorting out an enquiry.



Neville Upton, managing director of TLC, said that he was surprised companies were continuing to ignore what customers were asking for. "It's worrying that in 2007, businesses still do not have a holistic view of the customer. It's not surprising that people don't like contacting call centres.

"There is an obsession with cost cutting and using technology and using lower cost solutions. What organisations should be doing is getting the enquiry right first time for the customer so they won't call back, they'll then be happier and become brand advocates."

Elsewhere in the survey, 60 per cent of consumers say that will take business away from an organisation as a result of poor call centre service, while an honest 42 per cent are happy with a call centre being located abroad.

Even if call centres abroad offered certain advantages — like high service standards, lower prices and 24-hour access — one-third of all consumers would still prefer to be connected to someone from within the UK.

eCCF

Lloyds TSB says sorry for long call centre delays

Lloyds TSB has been forced to apologise for keeping its customers hanging on the phone.

The UK banking giant, which has ten onshore call centres, recently closed its operation in Mumbai in a bid to improve service and efficiency for customers. But, according to a report in *The Mail on Sunday*, callers to Lloyds TSB's contact centres in the UK are now being left on hold for as much as ten minutes at a time.

A spokesman told the *Sunday press*: 'We are currently experiencing an unprecedented number of calls to our telephone banking service. At peak times some people have been kept waiting far longer than we would like and we apologise for this temporary dip in service. But we are doing everything possible to get our service back to normal. We would like to thank customers for their patience.'

Following the introduction of an automated answering service for PhoneBank customers, the number of calls being handled by UK contact centre staff reduced by 26 per cent. As a result, Lloyds TSB intended to let onshore staff handle all enquiries — without the need to pass overflow calls to its Indian contact centre.

Additionally, it was announced that banking customers would be able to get the direct telephone number for their local branch. However, it is now reported that managers have failed to recruit enough extra staff to cope with this upheaval — leaving workers at the bank's ten UK call centres overwhelmed.

eCCF

More people than ever complain about customer service

A new survey by YouGov, commissioned by technology provider RightNow, has revealed that more than two thirds of people have made a complaint about customer service in the past year.

Almost 3,000 people were questioned as part of the research and 69 per cent of them admitted that they have complained to a company in the past year. Alarming, this figure is up from 55 per cent when the same survey was conducted last year.

The research also highlights a huge divide between customer expectations when it comes to making a complaint and the actual resolution, with 60 per cent of Britons expecting the problem to be fixed to their satisfaction, but only 27 per cent reporting that this is the case.

The top five reasons for complaining were: lack of response to an email or letter, poor products or services, a poor customer experience overall, having to repeat information over and over, and the length of time being held in a queue.

"Although the British have a reputation for complaining about the inclement weather, in reality, the majority of us don't enjoy making a complaint and it usually takes something relatively significant to drive us to that point," said Gladena McMahon, Accredited Cognitive Behavioural Psychotherapist, British Association for Behavioural and Cognitive Psychotherapies



(BABCP). "However, once at that point we do expect empathy and action. It's like most things in life, when we have a problem we seek a listening ear — companies need to be mindful of this and act accordingly."

Wayne Foncette, Rightnow's UK and Ireland vice president commented: "Consumer expectations are rising, so what may have been an adequate complaints procedure in the past is probably not going to suffice in today's marketplace where there's little to differentiate between price or product. Therefore, it's essential that organisations view how they deal with customer complaints as part of the wider customer experience strategy."

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Disclosure Requirement Legislation

There are 14 pending bills with a variety of disclosure requirements seeking to impose further regulations for contact centers- 2 of which are at the federal level. The majority of these bills propose mandatory location, identification, and/or purchase disclosures.

Here is a snapshot of a few of those bills. You will notice that several would have industry-wide implications:

Oklahoma H.B. 1292. Relates to consumer protection; creates the Call Center Consumer Right to Know Act; requires call centers to disclose the location of employees; requires call centers to certify compliance with the act; provides penalty for violation of the act; provides definitions; provides for codification; provides an effective date.

United States H.B. 4932. Requires businesses operating a call center to either initiate or receive telephone calls to disclose the location of such call center, and for other purposes.

United States S.B. 2553. Requires employees at a call center who either initiate or receive telephone calls to disclose the physical location of such employees, and for other purposes.

Connecticut H.B. 5783. Concerns the privacy of telephone records; restricts the disclosure of telephone records by telecommunications companies to third parties; requires telecommunications companies to take steps to prevent unauthorized disclosure of telephone records; increases the minimum amount of damages awarded in a civil action for identity theft.

Arizona H.B. 2446. Requires certain disclosures by "consumer services employees." Prohibits transference of financial or identifying information overseas.

ATA

Contact centre dissatisfaction rises

Consumers are becoming increasingly dissatisfied with contact centre service, but technologies such as VoIP may offer a solution, according to new research.

The Merchants Europe survey found that global customer satisfaction with contact centres has fallen to 68% from 82% last year. The telecommunications and service provider sector - including ISPs and fixed-line and mobile telecommunications companies - has the longest contact centre waiting times (at 65 seconds) and the highest rate of caller hang ups.

IT consultants Dimension Data predicts that VoIP can go a long way to improving customer satisfaction, with 20% of contact centre interactions now taking the form of email and text messages. "What we are likely to see is an increased technology presence to make the customer interaction across all of those channels seamless and less clunky than it is now," said Dimension Data's Paul Scott.

Callcentres.net

Cold calling is "old fashioned", says report

Legislation against cold calling is starting to take effect, according to a new report.

For the first year on record, the number of outbound calls made by UK contact centres is actually less than in the previous year.



Outbound calling activity as a proportion of all calls has declined considerably to 29.1 per cent from 32.9 per cent in 2005 — the second consecutive year of decline after years of relative growth.

“UK Contact Centres in 2007: The State of the Industry (5th edition)”, a report by industry experts ContactBabel, claims that cold calling is “on the way out” and are potentially damaging to a company’s reputation.

Steve Morrell, principal analyst at ContactBabel, explained: “Cold calling is increasingly seen as old-fashioned, expensive and potentially damaging to a company’s reputation. Legislation at a national and European level has reduced the number of unwanted sales calls that UK consumers receive, but outbound communication still has an important part to play in business.

“Although cold calls are on the way out, outbound value-added service will be a strong brand differentiator. For example, businesses which let customers know in advance about approaching credit limits or late flights will be rewarded with increased brand loyalty. However, we would also expect that cross-selling and advertisements will be an integral part of this procedure, as the price customers will pay for receiving useful outbound customer service.”

At present, more than half of UK households are registered with the Telephony Preference Service, which lets consumers opt out of receiving sales calls.

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Teleffective Grows Again

At the end of February of this year TRG launched Teleffective, Inc. as a business to business direct sales and telesales company. In two short months Teleffective has secured three significant clients. These client projects include lead generation and direct sales clients located in Canada and the US. Teleffective has hired experts in the field of telesales and is committed to exceeding our clients expectations.

About Teleffective – With offices in downtown Toronto and Ajax , Ontario Teleffective provides: Business to Business sales support in lead generation, account management, interim Inside sales/telesales and direct sales.

For more information on Teleffective visit our website at www.teleffectiveinc.com .

Teleffective can be reached at 1-888-732-5470 or 905-426-2305 or by email at info@teleffectiveinc.com



At TRG, we believe in happy endings.

To turn your call centre problems into personal and professional triumphs, just call **Colin Taylor at (905) 426-5055** or visit us at **www.thetaylorreachgroup.com**



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Inside TRG

Based upon demand we have elected to extend this offer to Customer Reach subscribers...see below

Recently TRG secured a Management Services agreement with Telepoll a Toronto based market Research and data gathering company with 15 years of experience. Telepoll's services include:

- Data gathering,
- Market Research,
- Customer satisfaction surveys,
- Mystery Shopper calling,
- Outsourced quality monitoring (3PQM)

TRG has secured preferential pricing for readers of Customer Reach. For a limited time Customer Reach readers who retain Telepoll services will receive a 20% discount off standard pricing. This discount will allow a company for example to complete a Customer satisfaction survey for \$5,000.

For more information about how your company can take advantage of this discount please contact Crystal MacIntyre at 905-426-5055 or by email at cmacintyre@thetaylorreachgroup.com .

Case Study

In this regular column we review the successes that TRG has been part of.

Assisted a Major bank to review its' Customer Interaction processes and identified more than \$5 million dollars of operational efficiencies

The Challenge:

A national network of call centers, significant staff turnover, unhappy customers, uncertainty regarding the benefits of outsourcing and challenges associated with delivering the value they sought from their call center channel. These were some of the challenges facing one of the largest financial institutions in Australia when they began speaking to Colin Taylor.

The Process:

Colin and his team of consultants began at the beginning, a Strategic Assessment a full end-to-end review of each of the 'moving-parts' within the call center infrastructure. The sweeping engagement assessed the people in the call centers, their skills and competencies, the processes, procedures, operational methodologies, technologies, quality and service practices and business objectives. With a number of centers and thousands of agents this was a significant exercise in terms of scope.

The Solution:


The bank employed state of the art, best of breed technologies and had invested heavily in self-service and workforce management solutions. Their operational methodology was based on a very successful internationally accepted model...so what was the problem?

There were fundamental gaps in the process maps and invalid assumptions being employed in defining the objectives and means to attaining these objectives.

By vetting and re-engineering the process maps, procedures and operational methodology we ensured that the objectives of the organization could be met. In the process we streamlined the use and application of the existing technology and implemented a limited outsource relationship, both of which improved efficiency and reduced expense.



The Result:

The bank improved its customer satisfaction, reduced turnover and leveraged enhanced benefits from their technology investments. In addition they established an outsource relationship that allowed them better control on the call patterns arriving in their captive centers which improved the center performance, as well as employee morale. The re-engineering process improvement, leveraged technology and outsource combined to total more than \$5,000,000 in annual operational cost savings! 

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The Taylor Reach Group, Inc. provides Strategic and Operational customer interaction consulting services that deliver Operational Innovation breakthroughs in Contact Center operations.

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