

Communicating Call Center Dynamics to Senior Management

by *Tim Montgomery*

You can generate a lot of executive excitement about your operation with just 10 minutes and four good slides.

Senior management just doesn't get it. That's a comment I've heard time and again from call center managers who are struggling with issues such as staffing, getting support for new technology or obtaining respect for their department. My reply is always the same: It's our job as call center leaders to get them to understand, and we can't stop until everyone appreciates the value and dynamics of our real-time inbound environment.

Now, you might be thinking (and I've heard it time and again) that it's easy to say if you don't have to live it every day. Fair enough, but as a former consultant involved in transforming senior management's opinions of the call center on several occasions, I know it can be done. The key is making it happen in targeted, digestible chunks. I've worked with many very smart people who, for one reason or another, have adopted a "keeping your head above water" approach to call center management.

The truth is that many senior executives with call center responsibilities have never run a call center. In many cases, they're focused on other organizational issues that pull them away from gaining a true understanding of our challenges. But that's not a bad thing—it actually makes it a lot easier to transform their opinions.

Lay the Foundation: Get Yourself Up to Speed

OK, so where should you start and what should you be doing? First and foremost, you need to be on top of your game. Make sure that you have a solid understanding of how to intelligently describe the tactical stuff, and make the connection between the call center and the value it brings to the company. Yes, to get buyin from others, you have to

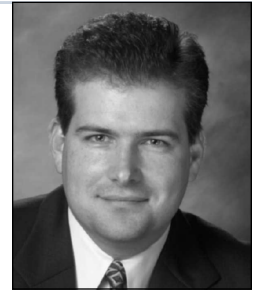
become a student of call centers and continually look for ways to sharpen your own skills.

My advice for staying on top of your game is don't try to reinvent the wheel—chances are, if you're reading this, you're looking for new ideas, which is a great first step. Make sure that your knowledge of call centers is not only accurate, but up to date, as well. Attend conferences, seminars and training courses that focus on the basics of call center management or more advanced courses on strategy and technology. Another way to keep abreast of the latest trends is to subscribe to—and READ—as many industry publications as you can. There are lots of free call center-focused publications available, and most provide weekly email updates.

While you're getting yourself up to speed, try to get a feel for what your senior management is reading. Many times, their ideas and strategies are derived from popular business books and non-call center periodicals. The next time you're in a senior manager's office, take a look around to see what newspapers, magazines and books are laying around—and then get a copy for yourself. You'd be surprised at how many ideas and theories from mainstream articles and books can be applied to the call center environment. The best part is, you can use them as a point of reference the next time you have an opportunity to "talk call centers" with the boss.

Create Impassioned Call Center Supporters

Once you feel confident that you are fully up to speed, get your senior executives excited about call center dynamics. The key is to create a vision—one that you can refer back to when conversations



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get off course (e.g., when senior managers begin to focus on how to get more efficiency out of every agent while providing the same level of quality).

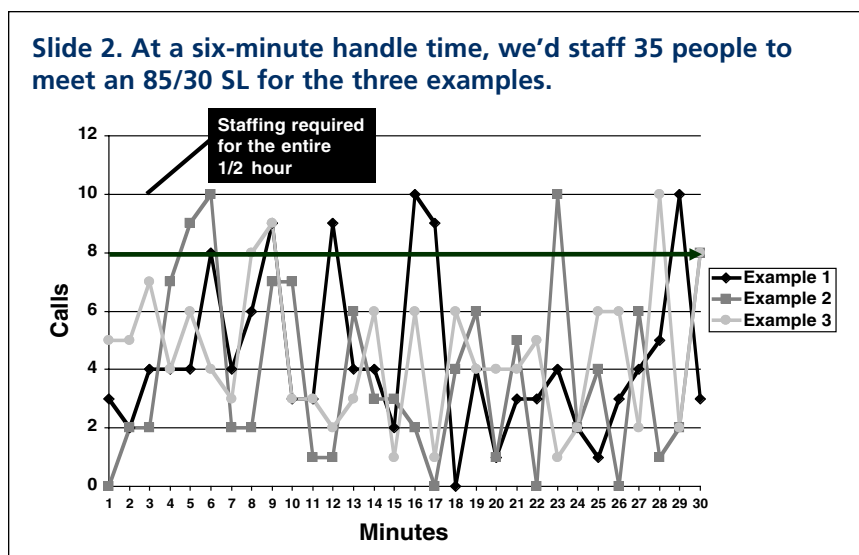
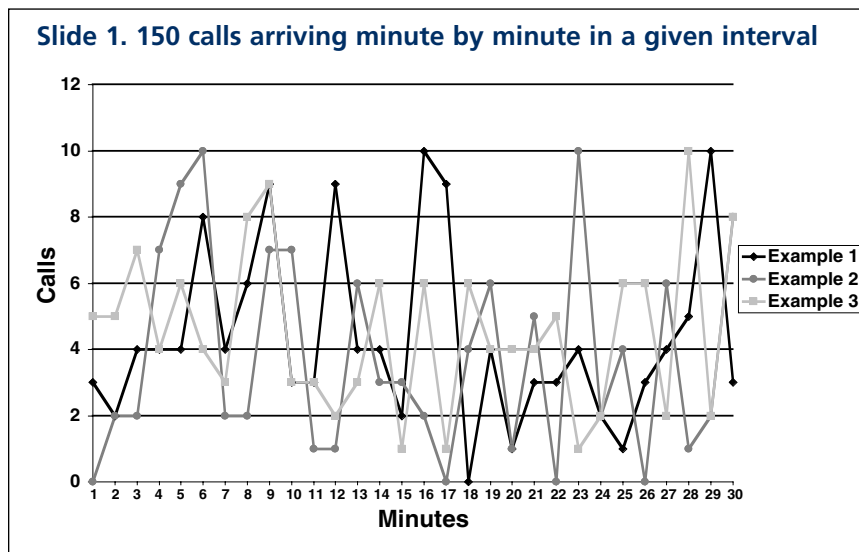
I once faced this challenge while working with a client. We discussed the fact that many of their internal processes were in direct conflict with call center principles. The client asked me to brief the executive committee on why this was so. The hitch: I had to make the case in 10 minutes using only four slides.

At first I was a little taken back by the request, but I soon realized that there's a lot you can do with four slides. The following is an example of how to create a vision for executives using just four slides.

Four Slides to Communicate Call Center Dynamics to Senior Managers in 10 minutes

SLIDE 1: SET THE FOUNDATION

- Minute by minute, calls arrive randomly, but when broken down to an interval (30 minutes), we can get pretty accurate with the forecast



- First slide shows this—three intervals of 150 calls offered, arriving randomly during a 30-minute period. The message here is we can't control exactly when they'll arrive, but we can determine the overall number in a given interval.

SLIDE 2: RELATE IT TO STAFFING

- To overcome the challenges with the minute-by-minute unpredictability, call centers use a formula—Erlang C—to determine the number of agents required during each ____ hour (or if you have a WFM system, it may use a modified version).
- Based on our service objective—in this case, 85 percent of the calls answered within 30 seconds and an overall average handle time of six minutes—the program tells us we need 35 agents staffed during the ____ period.
- What's important here is to point out the fact that we need 35 people in chairs talking on the phone, in an after-call work state, or waiting for the phone to ring.
- With any fewer than 35 agents, we will not be successful in meeting our objective. It's not an average for the interval, it's from minute one to minute 30 that we need to have 35 people.

SLIDE 3: EXPLAIN THE IMPACTS OF PEAKS AND VALLEYS

- Once you get an understanding of the randomness of call arrivals and the staffing requirements to overcome it, the real fun begins. I, personally, use this slide on a regular basis. It goes a long way in explaining the major challenges of managing an inbound call center.
- When looking at the arrival lines compared to the staffing line, you see there are times when we have more calls than people—otherwise known as a queue. The key here is to explain that this is part of the plan—ACDs are designed to hold calls in queue until agents become available, and any service level objective below 100 percent in zero seconds is planning for some type of queue. Some amount of queuing is planned, but the only way to keep it under control is to ensure that you have the right number of people—in this case, 35 from interval start to finish.
- The other take-away is the opposite of queues—when we have more people staffed than calls, otherwise known as idle time. Yes, this is also a requirement in every call center—to overcome the minute-by-minute random arrival, you have to build in some idle time. It's a reality and it can't be compromised. The only way to reduce it is to remove some of the staff, which will create queues, negatively impacting service level.

- This is normally question-and-answer time. You need to be on your toes and prepared to talk about idle times. Being able to effectively communicate this will help you to gain a lot of credibility.

SLIDE 4: BRING THE CONCEPTS TOGETHER TO FOCUS ON EMPLOYEES AND AGENTS

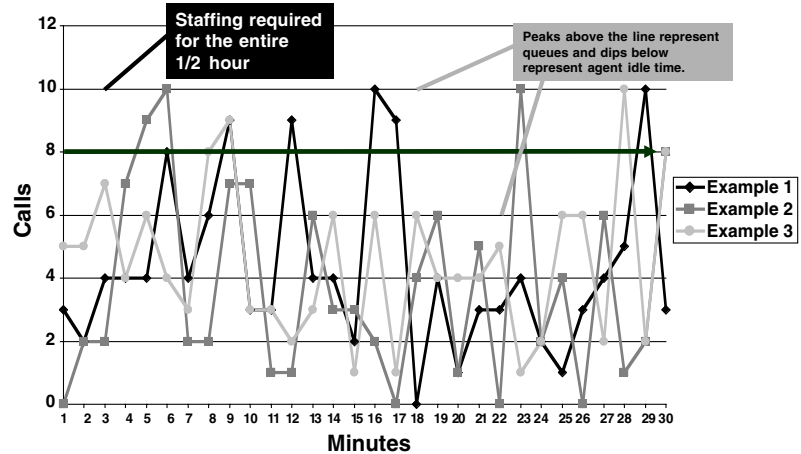
- Bring all of the concepts together with real-life data from your environment. The key here is to get the data out of the typical report format and create a simple, clean, easy-to-read/understand visual.
- Demonstrate how losing just a couple of agents can have a dramatic impact on the service provided to customers. This also shows how adding more staff doesn't really add to the overall customer experience.
- You can also use this slide to show how not staffing the right number of agents impacts everyone on the floor. In this example, losing a couple of people not only reduces the service provided, but makes the agents who are on the phones work even harder.

Use the Vision to Support All of Your Initiatives

So now you can see how, in just 10 minutes with only four slides, you can quickly illustrate how call centers operate and establish a foundation for executives to make better decisions regarding the environment. Once you've created this visual for your executives, think about the other points you can make—why fixed productivity measures (calls per hour) don't work, why your queue size may be causing agent burnout, why the smaller team groupings will require more staff, why you need more staff to focus on workforce management, etc.

The reality is, all of your call center headaches won't be fixed with four slides and an executive presentation, but without a senior level understanding of how call centers are different, you'll be stuck with implementing ideas that don't take into account the challenges of managing your dynamic real-time environment. ■

Slide 3. At a six-minute handle time, we'd staff 35 people to meet an 85/30 SL for the three examples.



Slide 4. Bring It All Together

Number of Agents Staffed	Percent of Calls Answered in 30 Sec. (Service Level)	Percent of Calls that get Queued for any amount of time
141	92.70%	24.40%
140	90.60%	28.30%
139	88.00%	32.60%
138	84.60%	37.40%
137	80.40%	42.70%
136	75.10%	46.60%
135	68.50%	55.20%

Above—doesn't add much to the customer's experience

Below—negatively impacts the customer's experience

Number of Agents Staffed	Percent of Idle Time per Agent (Inverse is Occupancy)	Idle Time per Agent in Minutes per Hour
141	8%	4.80
140	7%	4.20
139	7%	4.20
138	6%	3.60
137	5%	3.00
136	5%	3.00
135	4%	2.40

Above—adds additional idle time to every agent

Below—takes idle time away from every agents