



## Best Practices in the Call Center: A Customer Touch-Point Methodology

One of the biggest dangers in establishing best practices for your contact center is to do so in isolation from your self-service stakeholders. Instead, all customer “touch-points” must be viewed as part of a continuum. Customer touch-points include Web Self-Service, Interactive Voice Response, Contact Center Agents, and Face-to-Face transactions. By tracking the interplay between these, you can more easily identify meaningful key performance indicators.

### SYNCHRONIZE YOUR STAKEHOLDERS

Corporate strategic initiatives may seemingly contradict individual contact center goals. For example, your VP of Customer Service may want to improve customer satisfaction scores by 10% this year – but your CFO may want to decrease headcount through attrition. In this example, you must contemplate improving customer satisfaction with fewer people. This suggests some amount of automation and improved agent efficiency. A combination of the two is suggested because there are important linkages between these touch-points. For example, web self-service can link a customer to a live agent chat. Or a detailed web transaction may prompt a call to your Interactive Voice Response (IVR) system. It is all part of a continuum.

It is therefore a best practice to assemble live service and self-service stakeholders to discuss the balance between touch-points. A good starting point for discussion is to jointly characterize your customers. Choose characteristics that are meaningful for your business. For example: 1) Customer Types (e.g. retail customer in good standing, retail customer in poor standing, wholesale customer, etc.); 2) Monthly transaction

Caller Type	Absolute Monthly Call Volume and % of Total	Customer Service Priority	Transaction Complexity
Residential – account in good standing	26,454 45%	Low	Medium
Residential – account in poor standing	20,575 35%	High	High
Commercial Account – small business	8,818 15%	Medium	Medium
Commercial Account – large business	2,539 5%	High	High
Totals	58,787 100%	-	-

Figure 1. Grid for Characterizing Customer Groupings. This is a utility industry example

volume for each type; 3) Customer Service Priority for each type, and 4) the relative complexity of transactions.

### ASSESS TASK POPULARITY & COMPLEXITY

It is also a best practice to create a taxonomy of transaction types. This makes it easier to track the trends of task popularity across different customer touch-points. If paying bills can be done on your web site and your IVR system, and of course by speaking to an agent, it is valuable to observe the shift from one customer touch-point to the other based on incremental improvements made in each area. A web site “bill pay” usability improvement may decrease IVR and Agent utilization drastically.

Task / Type of Call	Avg. Calls per Month	Handled by Self Service	Handled by Agent
Balance Inquiry	37,824	74%	26%
Move Out	5,340	21%	79%
Electric Check Payment	3,964	75%	25%
Outage Reporting	3,364	83%	17%
Payment Locations	2,664	72%	28%
Payment Arrangement	2,364	64%	36%
Office Information	1,244	100%	0%
Meter Read	784	60%	40%
Peak Usage Program	460	73%	27%
Phone Number Update	356	46%	54%
Loan Information	192	100%	0%
Alternate Energy Program	120	86%	14%
Home Wiring Insurance	111	65%	35%

Figure 2. Grid for Tracking Task Popularity. This is a utility industry example.

### AUTOMATION CANDIDATES AND KEY PERFORMANCE INDICATORS

Once you have data on customer groupings and transaction types, figuring your automation candidates is straightforward. You can create a simple quadrant matrix using Transaction Type Volume and Transaction Complexity as X/Y coordinates. For example, in a Financial Services / Credit Card scenario, you may plot “Account Balance,” “Make Payment,” and “Increase Credit Line” as all being high-volume transactions, but in terms of complexity, they are simple all the way to complex respectively.

You may wonder which ones should be automated first. As a general rule of thumb, you should automate the high-transaction candidates first, starting with the least complex ones. The rationale for this is to make for quick successes that you can grow on. “Quick Hit” improvements can be done

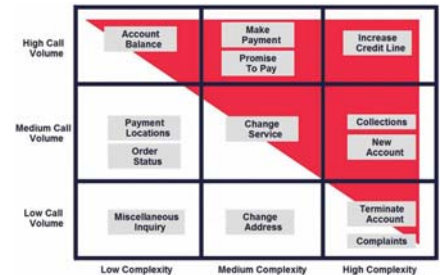


Figure 3. Matrix for Plotting Volume and Complexity. This is a Financial Services industry example. Here, the triangular part represents what the stakeholders may choose as an area of concentration for their particular needs.

on a small budget and the results can be used to convince management to do more complex projects.

Finally, you should define Key Performance Indicators (KPIs) to be consistent with your new findings. It is a good idea to link KPIs to the “Volume / Complexity Matrix.” Take, for example, handling a complaint. This type of transaction usually requires a longer transaction time. A complaint call is much more complex than a simple account balance inquiry. Therefore, a “Transaction Length KPI” for a complaint call would be judged differently than the length of a transaction and resulting KPI for an account balance inquiry. That is to say it is reasonable to be on the phone longer to handle a complaint. Simply put, you should avoid generalizations in developing KPIs. Instead, consider the “Volume / Complexity Matrix” when establishing KPIs.

In summary, you can improve operational efficiencies and also customer satisfaction by establishing your own customer touch-point methodology. This requires frequent synchronization with touch-point stakeholders, and an ongoing analysis of customer profiles, transaction taxonomy, and automation candidates. ■

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