

## THE DOs AND DON'Ts OF BUILDING A NEW CONTACT CENTRE

By Rod Jones

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*“The majority of new contact centre failures are as a result of too little knowledge and too much misguided enthusiasm.” Rod Jones*

When word comes down from the boardroom, “We need a call centre<sup>1</sup>”, a ripple of excitement will often flow through the organisation. New career opportunities! Sparkling new technologies! Plush new offices! Instant Customer Delight! It should be easy.

No. Its definitely not easy. Its hard. Very hard.

Sadly, the problems start at the executive level. Often, it is only one or two board-level executives who may have some vague idea that a call centre or a contact centre may assist the organisation to win market share; to generate incremental revenues; to win customer loyalty. Tragically, the next steps are often to pass the project to C-level IT executives or IT senior managers. And this is definitely the completely wrong starting point for a successful contact centre project. With all due respect to our colleges in IT: Technologies *enable* great customer service. Technologies *enable* contact centre to function effectively and efficiently. It’s the strategies, the processes and the people that determine the outcomes. When those three components of success are perfectly in place, bring on the most appropriate technologies!

### **Don’t Rush It**

It was Napoleon Bonaparte who so wisely said, “*Men, horses and cannon are useful in battle, but strategy and planning win wars.*” And when it comes to starting a new call centre or contact centre, there’s no such thing as too much planning. Pulling together the wants and needs of each of the divisions or business units within the organisation is, in itself a massive task.

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<sup>1</sup> The generic term, ‘Call Centre’ used to refer to operations only handling telephone calls. The modern Contact Centre handles all manner of customer communication channels. Th terms Call Centre and Contact Centre are frequently used interchangeably. In this article the term Contact Centre is predominantly used.

## **The Phased Approach**

The development and deployment of a truly successful contact centre will be achieved when certain activities take place within the framework of a series of disciplined, logical and clearly defined phases. And within each phase, there are specific deliverables.

**Phase One** – Develop Executive and Management Knowledge

**Phase Two** – Extract and Record Existing Operational Knowledge

**Phase Three** – Develop the Business Case and Obtain Executive Sign-off

**Phase Four** – Develop the Operating Model & Functional Requirements (Including technology specifications)

**Phase Five** – Deployment. (Premises. Fit-out. Procurement. Systems Integration. Installations. Staffing. Training etc.

**Phase Six** – Optimisation

## **A Little Knowledge is a Dangerous Thing**

It was the English author, Terry Pratchett who said, “*A little knowledge is a dangerous thing – but it’s not half as bad as a lot of ignorance*”. The most expensive and career-damaging new contact centre disasters almost always have their roots in too little knowledge and too little information. Rash, emotionally-driven business decisions seldom have good outcomes.

## **PHASE ONE**

### **Developing Executive Knowledge**

The modern contact centre industry will soon be 50 years old. It is now a well-matured global industry that has produced a massive body of knowledge, much of which has become freely available. Few executives or senior managers have the time nor the inclination to read through books about contact centres nor to spend many hours searching for on-line information about setting up and operating a successful operation.

Fortunately, much of the strategic knowledge necessary to make astute board-level decisions can be obtained from specific articles and white papers or from short, powerful boardroom presentations and keynote addresses, or by engaging as a group or one-on-one with appropriate specialists or trusted advisors.

## **Developing Managerial Knowledge**

Senior managers tasked with developing and deploying a modern contact centre need a great deal more knowledge and information to be able to effectively plan and implement the project. Whilst much of this knowledge is generic and can be learned from any of the many books and publications that are available, and from literally thousands of websites, knowing what to look for and where to find the appropriate information, is a huge challenge.

A good starting point is my 2-Day “World Class Contact Centres – Operational Best Practice” seminar. In this intense and highly interactive seminar, I engage with participants as we work through over twenty modules dealing with all the most important aspects of the modern contact centre. Topics covered include Customer Relationship Management (CRM) and its evolution into what is now referred to as Customer Experience or Cx. I also address the many ways to measure customer satisfaction (CSat) and the relationship between CSat, Customer Loyalty, Lifetime Value and Revenue. I spend a lot of time explaining how all the different call centre technologies work, how they can add value to the organisation, and what is considered to be ‘best practice’ when deploying these.

The seminar explores the human aspects of the modern contact centre. Participants learn about specific contact centre organisational structures, roles, responsibilities, job descriptions; about contact centre competency profiles and how to recruit for success. Managing, motivating and retaining the workforce is another important module, as is the critically important topic of quality assurance.

Impeccably designed and documented business processes are critical to the success of any contact centre; particularly in the initial design phase. A module in my seminar teaches participants exactly how to design processes using a globally recognised methodology and freely available process mapping software.

Accurate budgeting and on-going financial management issues are critical to the success of any contact centre. A module in the seminar teaches the fundamentals of Activity Based Costing and how to construct credible budgets and financial models.

The final seminar module deals with how managers can assess, audit and benchmark the contact centre against globally recognised best practices. This ensures that the operation is constantly under review and refinement.

## PHASE TWO

### **Extract and Record Operational Knowledge**

Assuming that the executive team and the managers assigned to develop the contact centre project have acquired a basic understanding of the key strategic and operational principals of a contact centre, the next phase will be to fully develop the business case. To achieve this, a great deal of in-depth information and knowledge about the organisation's existing operations will need to be gathered and well documented.

Gathering information and acquiring contact centre knowledge in a generic sense, is relatively easy. Books, websites and my seminars can do that. However, building the business case for any specific organisation, requires a great deal more in-depth and contextual facts and information.

In the majority of cases, the specific information needs to be 'extracted' from many parts of the organisation, and typically from executives and senior managers possessing unique knowledge and experience relating to their specific role, division, business unit or department. The reality is that most of this knowledge and information is not documented and is largely anecdotal. Knowing what information and knowledge to 'extract' and how to record and document it is the speciality of a well-seasoned and experienced contact centre consultant.

## PHASE THREE

### **Develop the Business Case and Obtain Executive Sign-off**

As mentioned earlier in this article, executive support is vital to ensure the overall success of the contact centre project. The starting point for the project team tasked with developing and operating the contact centre, is therefore to develop the appropriate reports and documentation and to ensure that the boardroom signs-off on the key strategic issues. These will typically include the following:

- A common view of the potential role of contact centre within the organisation and the opportunities that the new business unit can or must provide.
- An understanding of the issues and risks associated with fulfilling these opportunities.
- An understanding of what is involved in achieving a vision for a formal corporate contact centre strategy.
- The formulation of working principles that would underpin such a contact centre strategy.
- Draw high-level estimates relating to the cost of establishment and on-going operations and/or expansion of the proposed contact centre.

## PHASE FOUR

### Develop the Business Model

Clearly defining the Business Model for the proposed contact centre is critical for the successful operation. It helps the management team to clearly identify the operation's mission, the business goals, and the performance drivers that the operation needs to focus on to achieve these goals.

#### **Mission:**

- Identifies how the call centre supports the company's goals and strategies.
- Determines what the company needs from the call centre in the long term.

#### **Business Goals:**

- Represent short-term to midterm goals.
- Defines what the company needs from the call centre right now (12-18 months)
- Outline specific outputs that the call centre needs to produce

#### **Performance Drivers:**

- Represent processes and behaviours that help the call centre achieve the company's business goals.
- They must be clearly defined and must be measurable
- They represent the controllable measures that actions in the call centre affect

### Develop a Customer Access Strategy

A key element of the Business Model and the Functional Requirements Specifications will be the development of a detailed Customer Access Strategy. Included in this document should be the following considerations:

- **Customer Profiling:** Who are the customers? What are their needs? How can those needs be best served?
- **Customer Communication:** How will the organisation communicate with its customers?
- **Query / Contact Types:** What types and categories of interactions and questions or queries are anticipated?

- **Access Channels:** What other channels will be available to address customer issues? e.g. Telephone, website, kiosks, mobile, SMS, chat, social media, retail agents etc.
- **Service Level Objectives:** What resources will be required such as people, technology, and data?
- **Organisational Processes:** What types of organisational policies, processes and practices should be established? What already exists and what needs to be developed?

## Processes

Sound and thoroughly assessed, tested and well documented business processes are the heart and soul of an effective, efficient contact centre. Processes are vital to the planning of a new operation. Identifying and then mapping and documenting the dozens of individual processes that will or may interface with the new contact centre can often take many months.

The following are some of the most important reasons why process design and mapping is a critical element of the project to develop and deploy a new contact centre.

- To establish roles and responsibilities.
- Defining required skill sets & training.
- Defining business rules.
- Defining escalation procedures.
- Monitor efficiencies.
- Cost control.
- Forecasting and capacity planning.
- IT and system design and integrations.
- Reporting and management information/ analytics.
- Document requirements.
- Standardization.
- Training, skills development.
- Succession planning.
- Disaster recovery and business continuity.

## The People Issues

It is a huge mistake to think that 'anybody' can work in a modern contact centre. It is a very stressful, micro-managed environment where every aspect of staff engagement is monitored. Often, contact centre staff are required to work inconvenient or even downright unpleasant shifts. Yet, for many organisations, in the interests of providing exceptional customer service, shift work is inevitable.

The early stage involvement of an executive-level human resource specialist (for example, the HR Director) will ensure that all levels of management are fully aware of the disruptive impact that the contact centre will have on the entire organisation. Whilst there will be some exciting new opportunities for some staff, others will feel threatened. Change Management is an important part of planning.

## **Systems Integration**

Modern organisations have become incredibly dependent on many different technologies. Many of these have been integrated with one another to meet specific operating and business objectives. How these different systems will have to integrate into contact centre technologies can pose massive challenges for the organisation's IT team. For the contact centre development team, it is important to ensure that senior IT managers are brought into the planning discussions at the very outset of the project to ensure that vital integration issues are an integral part of the overall planning.

## **Functional Requirements**

Based on the strategic matters covered in the executive-approved Business Case and the key issues contained in the Business Model, the management team will be in a position to develop the Functional Requirements document.

This document will clearly set out and document the operations and activities that the contact centre must be able to perform.

Examples of what the Functional Requirements document should contain include the following:

- Descriptions of data to be entered into the system or used by the systems in the operation of the contact centre.
- Descriptions of operations performed by call centre
- Descriptions of work-flows performed by the operation
- Descriptions of system reports or other outputs
- How the system meets applicable regulatory requirements
- Where the contact centre operations will be located

- Detailed specifications of each of the technical components required to fulfil the operational requirements and how these are to be integrated into existing organisational systems.

## **PHASE FIVE and SIX**

### **Procure and Deploy the new Contact Centre**

#### **Optimising the contact centre**

These important topics will be discussed in future articles in this publication.

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#### **About Rod Jones**

Rod Jones is a specialist consultant and strategic advisor with over 35 years of practical experience building and operating contact centres. His 'World Class Contact Centres' seminars have been attended by over 4,500 delegates in 13 countries. Based in Johannesburg, Rod focusses on assisting developing the African contact centre and BPO industry. [www.rodjones.co.za](http://www.rodjones.co.za) [rod@rodjones.co.za](mailto:rod@rodjones.co.za)