Overview

Center of Excellence

GLOWTOUCH
PUTTING PEOPLE FIRST

Who are the people using what tools across which communication channels to provide exceptional experiences for your customers? That is the fundamental question in outsourcing a contact center and this document lays out the steps for ensuring that an operation is smooth-functioning with people who have the requisite skills, deploy well-conceived and tested processes, and use the proper tools to delight end users.

There are six key areas of emphasis: recruiting and hiring, training, policies and processes that speak to both the voice of the business and voice of the customer, technology requirements, existing infrastructure, and a system for measuring and analyzing performance. Staying on time and on task can be a challenge. The client's primary focus is on day-to-day activity and bringing value to customers. Any company that has not previously outsourced will find that the road to launching a contact center is dotted with regular calls and meetings with the service provider to ensure that visibility is not lost. Bringing the plan to fruition is a combination of art and science, and we are firm believers in the maxim of there is no such thing as a bad question.

Find What Works and Keep Doing It

The OneTouch methodology has been developed over our 18-year history, sometimes through trial and error but more often, by determining best practices and then standardizing them across campaigns and geographic locations. This approach encompasses the disparate parts that are assembled in constructing the whole. While the framework is applicable to all clients, OneTouch is not so rigid that it ignores the factors that make each client unique. Part of the question is familiarity with outsourcing, part is with the size of a campaign or the channels to be used, and part is the type of service that is involved – will customers reach out for tech support? Product information? Assembly or installation? Maybe a combination of all of the above.

These are important questions; companies who have used BPO services in the past often have clear expectations of what's necessary, of what works for them and – perhaps more important - what doesn't, and how to differentiate between a high-touch, white glove service provider vs one who simply responds to tickets. For the first-time client, there is no roadmap and the expectations can be fuzzy. To help those users, OneTouch brings to the table a series of best practices and SOPs that have been forged by application and tested over time. The sweet spot lies at the confluence of standardization where it is possible, with enough flexibility to account for any nuances with certain products or specific customer groups. An ice-breaker meeting with principles and stakeholders sets the tone for the journey.

Forward Thinking Requires Backward Planning

The initial meeting is a combination of matching people and functions between provider and client, understanding the client's expectation and measuring them against reality, and giving the client a sense of the capabilities being brought to bear. A projected launch date puts a mark on the wall, the deadline serving as a guidepost; from there, the project team back-times the sequence of events that will follow and the time each will take to ensure that the path to launch stays on track.

The ice-breaker represents the macro, 10-thousand foot view of the project – the anticipated activities that are common across all contact centers will be laid out, potential contingencies will be factored in, success will be defined so that we can both recognize it when it occurs, and what will be an ongoing feedback loop is set in motion. This meeting also serves to engage the client and the gain the client team's vision, what will be required to achieve it, and to gain insight into the steps along the way. From our standpoint, there is a good deal of visualization, particularly about potential points of failure. There is an old saying about the hazards of failing to plan; one element of that identifying the areas where a breakdown is possible and war-gaming solutions.

Assembling the Pieces

The most common scenario that leads a company to outsourcing its service and/or support functions for the first time is that growth has outpaced the ability to effectively and efficiently handle customer care. Determining the scope of the project addresses the type of agents who will be needed, the requisite skills required of them, building the training curriculum, agreeing on key metrics for agents along with analysis and reporting of performance, and the technological infrastructure that will be the backbone of the project. **With that information in hand, our team goes to work:**

01 The People

No matter how far technology advances, it cannot supplant the craving for the human touch among customers. We've probably all said "I just want to speak with a human being" in the frustration of navigating a cumbersome phone tree or scrolling through FAQs that are short of useful answers. Recruiting and hiring the right staff requires development of an agent profile: what are the necessary skills? Does the product or service require unique knowledge? Will agents specialize in sales, tech, processing, or will they fill a universal role?

The particulars of what make agents successful in sales or in tech support have been developed and experience, and are shared with the client. On the heels of knowing what a successful agent looks like comes of the preparation necessary to see that through. A secondary consideration is the calendar itself: are there seasonal issues to consider like holidays or festivals, is the launch date school graduations when job-seekers are more plentiful and motivated, and is the immediate talent pool deep enough to satisfy the requirements?

02 The Training

Few clients who are new to outsourcing will have developed customer care training programs. In fairness, this is usually due to the in-house team being familiar with the product or service. Training development is based on what the client expects agents to know or be able to do, what the workflow looks like, what tools are used, and what the key performance metrics are. It's a process that includes both classroom and practical application, assessments and role-playing exercises, and a nesting phase so agents can be primed for success. Depending on the complexity of the client's business, additional layers of training may be required, and we recommend occasional refresher sessions for agents to ensure sharpness.

A good BPO partner will have designed training programs from scratch. Doing this means becoming very familiar with the client's business model. Understanding the lay of the land fosters creative planning wherein potential scenarios can be written into the training program, a proper ratio of classroom instruction to skills application (the nesting phase) can be calculated, and the approximate length of time needed for agent to move into production can be determined.

03 Policies and Processes

What are the voices of the business and of the customer, and what steps are necessary to ensure harmony between the two? Customers have pre-defined expectations of any product or service that they use, and those expectations are reflected in communication with support agents. The end user wants fast resolution of problems and quick answers to questions, attentive agents who are actively listening and asking relevant questions, and to be treated with respect. The customer's voice is reflected in post-contact surveys of the interaction, reviews of the product or service, and whether they remain customers or recommend the company to others.

Meanwhile, the business has its own needs and preferences, and agents are an extension of those, promoting the goals of the organization and understanding what success looks like. The latter part involves an accountability matrix that considers measurable processes that are deemed important: call handle time, number of chats worked, upsales, or productivity. The metrics tend to be universal among clients, but their level of importance will vary by industry or by company. A useful agent scorecard will track several actions within an interaction for a more holistic overview of the customer experience.

We empower agents to create an atmosphere of customer delight by keying on those areas where the two voices overlap. There is often a synergy between the two. The voice of the customer provides invaluable data; what better resource for feedback is there than someone who is paying for the product or service? Interactions are analyzed for agent opportunities and product opportunities, along with recognizing the encounter from the customer's viewpoint. The data formulates an agent scorecard that highlights both strengths and areas for improvement. Deep dives into the data can spot broader trends across the customer base, helping to inform organizational decision-making.

04 Technology Requirements

This is more than just deciding which communication channel(s) to use. It also entails the right CRM tool, a ticketing / tracking mechanism, call recording systems, analytical tools, and other considerations. Clients new to outsourcing typically use email and voice as their in-house conduits to customers, because the channels are convenient and familiar to consumers. They are less likely to incorporate chat or SMS or social media; a quality BPO company will be experienced in those.

There are numerous options to consider; these are just some:

- Automated Call Distributions (ACDs) / Advanced Interactive Voice Response (IVRs): These can be customized and set to handle multiple skills and channels.
- Customer Relationship Management (CRM): Nothing revolutionary here. There are some known brand-name solutions in use and some organizations have their own systems. We're comfortable either way.
- Call Recording Systems: These provide numerous benefits from after-the-fact clarification to coaching to integration with quality measures.
- Workforce Management System: Useful for forecasting transaction

volume in order to the optimize the number of agents who are on the floor during given time periods.

- Quality Management System: This benefits management by providing into performance during transactions to determine how well agents adhere to defined procedures.

Implementing the right tools is as important as finding the right people.

05 Infrastructure

Like technology, a measure of existing infrastructure will almost certainly be in place. But is it mapped for the purposes of a contact center: to where do the toll-free numbers wring, what is the inbox where a generic 'Support@' email address lands, is the client familiar with chat? A BPO partner will a mature IT and telecom backbone; there is no other means of successfully operating centers that cross international borders.

Infrastructure expansion can be time-consuming because of the steps associated with implementation. From state-of-the-art telephony technology to bandwidth capacity, we are engineered to make ready contact centers for any size business. There are built-in redundancies to ensure that operations are unabated. The larger questions are, what does the client already have and what else is going to be needed?

06 Performance Analysis and Measurement

After the people, policies, and processes are in place and operations begin, what may be considered the real work begins – ensuring that performance standards are being met, business goals are achieved, customers are delighted. This means a tested system of quality monitoring and performing analysis. Unless aspects of performance are measured in an objective manner, how can you be sure that your outsourcing investment is paying off?

At the surface level, key metrics are identified and performance against those is analyzed; at a deeper level, the QA operation digs deeper whether to "listen" to what agents and customers are saying, to find opportunities, to spot small trends before they become large concerns, and to provide a framework for coaching agents when necessary. There are numerous sub-steps in this area that go beyond monitoring and measurement:

- **Analysis:** We follow-up to find out why things occurred and, where necessary, map out remedial steps to prevent recurring issues.

- **Coaching:** All agents are not created equal and every team will have some members who need additional help.

- **Actions plans:** Things occasionally go wrong, and every problem demands a solution. This may be retraining, re-engineering a process, or addressing a product flaw, but any issue will get a recommendation for corrective measures.

- **Calibration/Clarification:** This resolves any confusion between what the QA team finds and what the agent thinks occurred. It is also key in maintaining alignment between the factors key to clients and what our team is monitoring and analyzing.

From the icebreaker meeting throughout the duration of the campaign, GlowTouch is a partner in service excellence. We understand that clients have different imperatives which is why we season the approach with flexibility and regular calls and meetings to ensure that both sides are on the same page. Our goal is to foster partnerships with clients; we treat the client's customers as if they are our own because, in a sense, they are. The goal of rewarding customers experiences drives both of us, even if for different reasons. We are always open to suggestion and change, for that's how many of our SOPs and best practices came to be. And we will work to earn your business every day.