

## Top Tips from Primary Matters' Customer Successes

By Greg Borton, CEO

The following "best practice" tips are based on the successes that companies partnering with Primary Matters have accomplished in 2004. These companies include SUN Microsystems, SAIC, Wells Fargo, McKesson, Norstan and Entergy. We are confident that these tips will prove helpful to your organization in 2005.

The [leading companies](#) implementing these programs have reaped increased productivity and better management control, while improving their quality of service. As a result, they have leveraged and increased the value of customer service and contact centers in their organizations.

### 1) ***Be Strategic to your Business; Don't JUST be a Cost Center***

To achieve increased funding and respect from the other groups within your organization, focus on how your Customer Service and Contact Centers directly affect the bottom line. Provide inter-function proposals for increasing profits via upgrades in product/service features that affect Customer Service and its interdependencies with other groups. Focus on revenue opportunities. Create the business cases and use the language used by the other VPs and Executives.

Communicating your business value leverages customer service, enabling it to become a peer to other corporate functions, not just a cost center. For a detailed discussion of this topic, see the White Paper: "[Customer Contact Centers are Still Not Strategic](#)"

### 2) ***Communicate your Value...Not just "What You Do"...to the Budget Committee***

Take control of the budget process by providing information showing your value to Customers. Don't focus simply on the number of customer contacts you handle. Show your role in supporting the customer relationship, the revenue that you support, the consequence of not offering the same level of service, and the opportunities for enhancing the relationship.

Provide Transparency into your organization by communicating your business processes and their value to your Customer. Use the Customer's viewpoint to express this.

When costs need to be cut, more than cooperate by enabling management to make the hard choices with you. If management says, "Reduce your Headcount", agree. Then inform them of the investments that can be made to increase productivity to meet the headcount goals, while still providing the same level of service. Show them the consequence to the customer relationship if the investments are not made and customer service quality declines or services are simply no longer available.

Don't let the Budget Committee simply tell you the headcount you can have without completely understanding the consequences, including the full costs to rehire and retrain when service becomes a priority again.

See the White Paper, "[What Management Needs for Planning, Budgeting and Assessing Business Strategies](#)"

### 3) **Manage Your Outsourcers; Don't have a "Hands-Off" Approach**

There is a growing recognition that the mainstream 'hands-off' relationships between companies and their Outsourcers, as embodied in most of today's contracts, are not meeting the desired business goals. In order to take advantage of the outsourcing opportunity, some management techniques are of greater importance than when an operation is part of a company. In particular:

- Ensure that the goals of the company and the Outsourcer are aligned.
- Be able to measure what work is actually being accomplished instead of looking at high level measures that only hint at what is going on.
- Match the actual work performed to monthly invoices.
- Jointly innovate, re-engineer work processes and pursue technology innovation to reap the consequent productivity and quality improvements.

See the White Paper "[Activity-based Planning for Outsourcers](#)" for a detailed discussion of this opportunity.

### 4) **Understand, Quantify, and Measure Your Business Processes and Cases**

Simply looking at call activities and site visits do not tell you enough...

Outside of the technical support discipline, too many organizations consider the 'call' or the customer site visit as their main metric. In fact, they are really handling cases that consist of multiple calls, emails and visits.

Not defining and measuring your business processes or using the 'case' concept means that management focuses on call content and efficiency and not on the process that is being managed on behalf of the customer. Efficiencies and self-service opportunities are missed. The 'cost per call' or 'cost per visit' is misleading because it doesn't provide complete information.

### 5) **Manage Self-Service as Part of a Business Process...Not as a Stand-Alone Approach** (i.e. an IVR or Website)

IVRs and Web Sites are tools one uses to provide self-service. However, achieving the best self-service is accomplished by understanding the business processes, and optimizing which media addresses each step of the business process. Then you measure the effectiveness of each different media and the personnel in providing their part of the business process.

For example, currently, the common practice is to assume that if a caller hangs-up when using the IVR, that the customer received what they need. Reports are not created specifying the service the caller used on the IVR and whether they called back and re-did the work with the Agent. This same problem is even more apparent when viewing the relationship of the Web Site with Agents.

As a result, major productivity opportunities, as well as customer satisfaction goals, are missed because the business process cannot be viewed as what it is – a single transaction using different media types to achieve the goal.

## 6) **Measure and Manage Your Employees from the Viewpoint of the Employee Job Life Cycle**

For organizations with high new employee turnover, training of more than 3 weeks, and a several month on-the-job learning cycle, optimizing the work force based on the employee job duration may be the most important factor in addressing quality of service, productivity and efficiency.

See the White Paper, "[Measuring and Managing the Productivity and Costs of Employee Job Life Cycles](#)".

## 7) **Ensure that your Employee Incentive Plan Maps Directly into your Goals**

Contact Center Agents quickly understand how to change their work practices based on Incentives Plans.

For instance, there are many cases where the use of Agent Work States (AUX Work in particular) are misused, actually lowering productivity and quality, in order to increase incentive scores. In these cases, Agents may put callers on hold, do their 'post-call' work, and then take the caller off-hold letting them know their work is done. This costs additional 800# number costs, takes more caller time, and misleads management about the work being accomplished.

Significant care must be taken in establishing Agent Incentive Programs to avoid skewing behavior in inappropriate ways.

## 8) **Avoid Simple ROI Analysis to When Making Decisions on Projects**

Results from simple ROI Analysis are usually inaccurate and can't be used to determine whether your business goals have been achieved. Often typified by those available from vendors, these analyses are usually misleading and can't be used to track the actual benefits of projects. The VP and Executive levels of many organizations no longer trust such analyses because of these reasons. The claim is "I never know whether the funding I approved actually gave me the promised results."

This mistrust results in funding requests being refused, even if a project may be highly desirable.

See the White Paper "[Business Impact and ROI Analyses that Support Project Funding](#)".

## 9) **Bring Primary Matters in as Your Partner to Success!**

Our business modeling tools, coupled with expert consulting and project management, are optimally designed to address these and other opportunities that are available to Customer Service and Contact Centers.

Give us a call and we'll discuss how these practices will help you meet your challenges and goals for the New Year.