

Marketing – Managing Customer Contact

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Customer Contact Solutions: Strategies for Action

As customer contact points proliferate, you need a cohesive plan to turn your customer service vision into operational reality. However, how do you adapt and thrive in today's marketplace? What differentiates truly great organisations? While there are many possible answers to these questions, an effective strategy clearly plays a key role. Unfortunately, mention strategy, and many managers justifiably conjure up images of an overused business buzzword or the last business book they read. All the while, many organisations struggle to create viable, sustainable strategies. Somewhere between strategy and tactics, the vision too often gets lost, or at least diluted, in operational realities. That seems to be especially true in developing cohesive, customer contact solutions.

The Customer Access Strategy

What's needed is a mechanism for extending corporate strategy into tangible, realistic applications. In the call centre realm, strategy is embodied in what is often termed a "customer access strategy," which is a framework – a set of standards, guidelines and processes – defining the means by which customers are able to access resources capable of delivering the desired information and services. The "customer access strategy" is an extension of corporate strategy and often, in turn, also helps shape corporate strategy.

The need therefore for a cohesive approach to managing customer contact becomes ever more important, particularly as contact channels proliferate, customer expectations evolve and services become more complicated from both the customer's and organisation's perspective. When approached with the right commitment and buy-in, an access strategy is a powerful tool for simplifying services and unleashing the potential of the call centre to create value for both the organisation and its customers. Developing such an approach has broader implications than first meets the eye. By nature, it positions the call centre as the communications hub of the organisation, and customer loyalty as the primary objective. It is an effort that will touch virtually every business unit, so it must be supported by top-level management.

As with corporate strategy, customer access can take many different forms. And, as with corporate strategy, there is a lot of confusing and conflicting advice on how to best approach the process of developing customer access most effectively. However, the most sustainable strategies cover, in one form or another, the following business processes:

- Developing customer profiles – who are your customers and prospective customers, what do they want and need and how can you best service those needs? While a strategy document generally doesn't go into individual detail, it should define specific customer types and their evolving expectations
- Customer communications – how the organisation plans to communicate with customers and establishes guidelines for developing messages and ensuring that the organisation is integrated in how it disseminates information (e.g., that the call centre is properly informed of marketing campaigns)
- Defining contact types – which types of interactions will there be with customers (i.e. categories can include such things as placing orders, changing orders, checking account status and problem resolution)
- Identifying access channels – all channels of contact should be outlined; for example telephone, web, fax, e-mail, kiosk, handhelds, face to face service and postal mail
- Service level objectives/agreements – to include both service level and response time objectives (agreed to and specified by all parties)
- Defining the required resources – getting the customer's contact to the right place at the right time, into the realm of “doing the right thing”
- Capturing customer data – understand the methods used for capturing information on each customer interaction, and defining how that data will, in turn, be used to strengthen customer profiles, identify trends and improve products and services

Clearly, such a sound strategy is not something you throw together quickly. It takes leadership, persistence, participation from across the organisation, and a lot of collaboration and cooperation. Consequently, it is best developed within a broader strategy development framework.

Developing an effective “customer access strategy” is therefore no easy task. Because it touches virtually every traditional business unit, it requires an immense amount of collaboration, cooperation and leadership. And as each of the processes are interrelated, changes to one will impact all others. Without a system or approach for ongoing development, strategy quickly becomes out of date and ineffectual. The following stages can help in developing the best way forward:

Create a Connected Vision:

Vision is the creative ability to see past current circumstances, to understand “what could be?” As much as the concept of vision has been overused by some in business circles, vision remains the undisputed motivation behind any human change or action. Call centres enable customers to access the services they want, when and how they want it, while enabling the organisation to benefit from the relationships, exchanges and information that come out of those contacts. To live up to this potential, this vision must be related to the highest levels of the organisation's strategy.

Build Skills, Knowledge and Leaders:

Defining the skill sets you need to support your vision and strategy first involves developing "maps" of resident versus required competencies for every key requirement (position) in the call centre and identifying areas where you may be vulnerable, i.e., where only a few people possess important management or technical know-how. Other aspects of this step involve developing hiring and training plans; implementing a process for recognising and cultivating management and leadership competencies; instilling an understanding of queuing dynamics and unique call centre planning and management implications into the culture; establishing appropriate performance standards; and, defining and developing attractive career and skill path alternatives.

Implement Connected Plans and Processes:

This refers specifically to putting the planning and management processes in place necessary to support the way forward. In today's environment, this usually involves forecasting, scheduling and real-time management across all channels of contact; simulating "what-if" scenarios given increasingly complex routing and distribution requirements; redefining agent group structure to move towards a true multimedia queuing environment; and, improving collaboration and planning across the organisation.