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Creating Value in a Call Center Support Model

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Abstract

With an increased workload and overwhelming changes to manage through, the resource planning team of the Kingsburg Call Center redefines how they will support and provide information to the partners. They use the integrative thinking model to craft a creative solution and then utilized emotional intelligence and empathy to ensure they were meeting their stakeholders needs.

Keywords: Empathy, Emotional Intelligence, Support, Integrative Thinking, Creative Problem Solving, Call Center, Resource Planning

Section 1: Introduction to your Capstone Project

As a company, we have 19 call centers across the nation who are all able to operate in a consistent basis for the most part. All but our site operates in the same line of business, taking the same calls and held to the same metrics. In addition to this, they are all also established sites with processes that lead to the results they need individually and without all the changes that come with a growing site. Our call center is double the size of the next site as well as the amount of movement we have within the site due to our rapid growth is astronomical. All in all, my team had a much higher workload than their peers and looking at our closest peer site in size, Charleston SC, we were able to derive that our team had 57% more workload based on staff alone, their movement within the site was 0.50% of what we were seeing and our data entry demand was over 30% higher than what they have, all with the same amount size of 7 team members.

Based on this, I decided to reinvent the way we support our site and recreate the hierarchy of who we support. This project was to define what our level of support will be to the site, what actions will be included in those definitions, and create value within this new support model from our stakeholders to ensure we have their support going forward. An ancillary reason for this project was to improve communication and collaboration within my team as well as set consistent expectations of them from their peers. We would spend time working through the support model as a team and gaining feedback from select stakeholders for implementation. Once we have our finalized product, we will then go out and present this new model to our partners and gain their buy-in for the level of support we will be offering. In the last phase of the project, I will engage with the managers on the floor to listen to their perspective and gauge their understanding and buy-in of how we will support the site.

Section 2: Elements Coming Together

Innovative Approach

Being that all other sites could have a consistent process, but that process not being feasible for our implementation, we needed a change. I wanted to take a different approach than the past and really bring the team in as the creative genius to solve it. I remembered the quote from Twyla Tharp as shown in *Creating Great Choices: A Leader's guide to Integrative Thinking* "creativity is not just for artist. It's for businesspeople looking for a new way to close a sale; it's for engineers trying to solve a problem..." (Riel, 2017, location 803). I was focused on taking aspects of the integrative thinking process and having my team go through it to spark their genius.

In a meeting, we looked at the either/or statement I wrote, and we defined the problem we are looking to solve. After we agreed on the statement of "either Resource Planning provides Manager level insights or we focus on Senior Manager level support," we jumped into creating both models in ways that would reduce workload for our team.

Emotional Intelligence

Through these conversations, our team remained focused on our intended outcome and making sure we were reducing our workload. The issue we were seeing through the project was that both models were very focused on transferring our workload to our operations partners. A change in our approach needed to happen as we were forgetting the most important individuals, our stakeholders. Goleman stated that "empathic concern... enables you to sense not just how people feel but what they need from you" (Goleman, 2017, p. 3). This was something big that we needed to ensure we were putting into our models.

I focused our conversations on how we could create value within our services. Once I

stated to the team that it was our responsibility to gain buy-in from them for our process, it changed the conversation. The team started to long list what it was like to be in their shoes and what the expectations would be for them.

Creative Thinking

This allowed my team to really take a different look and perspective at our model and start looking for ways to make both roles easier, not just ours. Once we had both models listed out, we then started trying to take what was great about each one and what we would be willing to sacrifice. Building the models with empathy and looking at them through our stakeholders' eyes, we were able to really combine these models into an integrative model that reduces workload on our team while also empowering our stakeholders through education to obtain the same results.

Your Innovative Solution

Our solution is innovative not only in our model, but also our approach for rollout. After we were able to complete the model with aspects of support for both our Senior Managers and Mangers, our team went out and received feedback from trusted leaders. What we were trying to accomplish here was to get 20% of the leadership base to buy-in and become the early adopters in the site. According to the law of diffusion of innovation, you must get over the tipping point of 15-18% market penetration before you are able to obtain “mass market success... of an idea” (Synek, 2009, 11:30). By looking for those early adopters and gaining their feedback, we were able to adjust our model as needed as well as created unified talking points to overcome objections for the rollout. This was a good adjustment in our approach as it helped us to align better as a team and to ensure we were fully meeting the needs of the business as well as our need to reduce workload.

We had also went through Emotional Intelligence training in November 2022. We refreshed our memory of relation management, which Terry Bradberry defines as “your ability to use your awareness of your own emotions and those of others to manage interactions successfully” (2009, p. 43). We talked tactics and used the strategy of “Take Feedback Well” from the book Emotional Intelligence 2.0 to prep. This refresh helped us to prep on those early conversations as well as manage the rollout of the process to the entire site.

Section 3: Results

We were excited to measure our impact based off a survey that was supposed to be released at the beginning of this month. We had a survey go out in January where we obtained a 75% rate of understanding on how to utilize our team for success (which was on par with the rest of the nation) but received some rough feedback about our team and the consistency of our support. Unfortunately, our director did not send out the survey this month as expected. This led to another adjustment in our plan of going out and soliciting feedback to make a directional connection between the two data sources.

What we found was a huge benefit to our stakeholders as they have a better understanding of how to utilize our team as well as knowing what to expect from their individual CPA. They were very appreciative of the instruction our team is providing their team on how to utilize the reports and data we are providing as well as knowing they will receive a consistent message from our team. It is safe to assume that our rate of understanding how to utilize our team will end up in the 90s when the survey comes out again.

Section 4: Conclusion

As anticipated, we received some feedback on the process as leaders felt as though we were pushing our responsibilities onto them. The team was able to overcome those objections

and work through them with the backing from the managers who agreed that this was the best approach. We made a last-minute change to our presentation and added a “restrictions and grounding” area that showed the difference in workload to help leaders understand that we are in a different space than what they may be used to in other sites.

What surprised me was the ancillary results of my team unifying and coming together through this process. There were some struggles on the team with people not working together, but what I did not anticipate was them all understanding now what is expected of each other has led to team members holding each other accountable for what we have promised our stakeholders in our project. There is also much more collaboration and teamwork happening through our meetings and desk area as well.

The only thing I would do differently in my approach to this project would be to go through the entire integrative thinking process with the team. I did utilize a rough framework of what I wanted the model to look like, but seeing how my team managed this project and how much they grew, I will give them the benefit next time of framing the problem from the beginning and creating the entire framework and model themselves versus keeping them in the guiderails I gave them. They are in a space to now to really knock that creativity out of the park and start solving some very complex problems.

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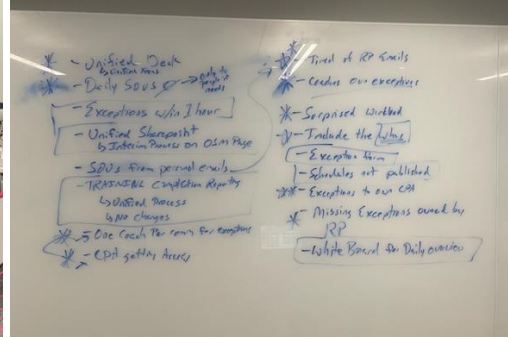
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Appendix

Kingsburg RP Support Model



Pictures of our working sessions and some of our white board work



KINGSBURG | RESOURCE PLANNING SUPPORT MODEL

Constraints and Grounding:

- Frontline Ratio
 - Kingsburg: 1:171
 - Charleston: 1:114
 - 57% more workload
- Leadership Ratio: (CPA:MGR)
 - Kingsburg: 1:4
 - Charleston: 1:2.57
- Changes in last 180 days
 - Kingsburg: 2,697
 - Charleston: 16
- Amount of exceptions emails in last 180
 - Kingsburg: 12,000+
 - At least 1 minute per exception (~1.7 per email)
- Training and Events
 - More in our site versus others
- Ramping site
 - Low leadership tenure
 - Information overload
 - #PIVOT Culture
 - 86 total new hire classes (18 classes a year normalized)

| Action | Resource Planning Owns | Operations Owns |
|--|---|---|
| Verint Audits | <ul style="list-style-type: none"> Weekly audit to manager on missing exceptions | <ul style="list-style-type: none"> Daily audit for missing exceptions |
| Exceptions | <ul style="list-style-type: none"> Entering exceptions as needed daily and having all entered in prior to end of day | <ul style="list-style-type: none"> Sending exceptions for attendance within 1 hour and meeting/coaching exceptions prior to day of. |
| SOU's | <ul style="list-style-type: none"> Daily reporting on missing SOU's day of as well as previous 7 days | <ul style="list-style-type: none"> Sending exceptions to inbox to fix coding within 2 days |
| Trainings | <ul style="list-style-type: none"> Scheduling trainings within 3 days of start and weekly reporting | <ul style="list-style-type: none"> Completions of trainings |
| Changes to schedules (Coaching changes, Meetings, etc...) | <ul style="list-style-type: none"> Processed in Verint | <ul style="list-style-type: none"> Communicate changes to CPA |
| Hierarchy Changes (Interim, Role Change, hybrid, etc...) | <ul style="list-style-type: none"> Processed in Verint and Samson | <ul style="list-style-type: none"> Communicate changes to Team Changes distro or follow applicable process from the Care Strategy Page |
| Processes | <ul style="list-style-type: none"> Creation and roll out to leaders of new processes Consistent and Accurate reporting based around the data we have access too | <ul style="list-style-type: none"> Utilize Care Strategy processes page to follow correct process and communication methods Utilizing Care Strategy to assist with processes and reporting to provide data accuracy and relevancy |
| Reporting | <ul style="list-style-type: none"> Training on reporting and how to utilize reports for success | <ul style="list-style-type: none"> Utilizing training in reports to drive team performance and success |

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Our finished product and what we rolled out to leadership.

KINGSBURG | RESOURCE PLANNING SUPPORT MODEL

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