STRIKE WHILE THE IRON IS HOT

Seize the opportunity to make a case for proper funding of your contact center.

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"The idiom *strike while the iron is hot* may be traced back at least to the 1500s and is a reference to the art of blacksmithing. When a blacksmith works iron, he heats it in order to make it malleable and then places it on an anvil and hammers it into shape. Of course, iron only stays hot enough to work for a limited amount of time, so a blacksmith must strike while the iron is hot in order to be successful" (from the Grammarist).

What does blacksmithing have to do with contact centers? It is more than you might imagine from a metaphorical perspective. Some contact center leaders face what feels like organizational barriers made of steel. Contact center leaders need to know, as does the blacksmith, when to strike. This idiom has more to do with knowing when to strike, knowing when to "grab an opportunity before it passes, and taking advantage of an opportunity before it is too late. To *strike while the iron is hot* means to not dither, to act decisively."

Why This Topic?

I was driven to this topic as I absorbed the findings from the "Contact Center Challenges and Priorities for 2021" survey results in the January 2021 issue of *Pipeline*. Among the highlights from all that fine work was the answer to the question, "Has the business impact of COVID-19 elevated awareness of the strategic importance of the contact center among senior management in your organization?"

Of the total number of respondents, 82% answered YES and a staggering 90% of healthcare respondents answered YES. All I can say is that the *iron is hot* across industries and *on fire* in healthcare. Now is the time to strike!

Executive-level awareness is like hot steel... temporary. Seize the opportunity to make a case to senior management if you have both opportunities and gaps to close. *What did your contact center accomplish during this pandemic? What results have you achieved despite the disruption? What propelled you forward and what held you back? What will it take to move forward? What proposal would you like to make to senior-level executives?*

For many, the disruption of the pandemic is not over and recovery is ongoing. However, temporary situations must be translated to long-term solutions. There has never been a better time than now to engage the executive level.

We have seen this newfound attention at the senior levels of the enterprise result in serious changes and significant investment in the contact center. Whether it be staffing, technology, training, etc., meeting the needs of the business, for many, has meant properly investing in the contact center.

The contact center has played a major role in many industries during this pandemic. For the purposes of this article, I will use several healthcare examples. Healthcare is an industry whose executives have struggled to understand and invest in their contact centers. Yet,

they have suddenly found themselves turning to these formerly invisible assets to take on an incredible amount of unforeseen demand.

Based on our consulting work, I have worked out three areas to focus on when structuring and preparing your case to the executive level for investments. My examples will illustrate the power of the contact center's ability to self-promote when building a case to executives.

1 Shine a Light on the Contact Center's Value

Document, document, document what you have accomplished and highlight the impact of those accomplishments to the organization. Identify your areas of strength and weakness to demonstrate needs moving forward. The time to have these conversations is NOW. Consider the significant impact of healthcare access centers and the operational impact of work-from-home (WFH) initiatives.

IMPACT OF AN ACCESS CENTER

Healthcare access centers handled an explosion of demand as COVID cases crept up and massive changes had to be made. Healthcare faced the cancellation of literally thousands of appointments (e.g., office visits, procedures, tests and surgeries) as shutdowns occurred. Those whose patient portals were not well-provisioned and deployed faced much more manual and human intervention to address the demand. Inbound call volume was often off the charts due to the level of concern and confusion. Institutions across the country were depending on the access center to handle a declining situation. It was charged with scheduling, rescheduling, cancelling, rescheduling, scheduling... and on and on.

During this period, there were also new appointment types. Telemedicine and video visits required electronic systems to program new diagnostic codes, new templates to schedule physicians, and new tools for patients to use in order to launch the virtual interaction. Access centers stepped up and made it all work.

Once the shutdowns were reduced and hospitals and practices reopened, patients now needed to book appointments. This created a new scheduling demand and the booking of literally thousands of appointments. The healthcare needs of patients were met by leveraging access center infrastructure.

Self-service and digital access is weak in many healthcare systems. There has been a kind of cultural resistance to it. This has left many healthcare systems woefully unable to balance their load during these difficult times via self-service options hence, demand fell to the access center to handle.



> "There's a phrase: to strike while the iron is hot. The iron is hot."
>
> —JOANNE WUENSCH, WALL STREET ANALYST

COVID testing and vaccine scheduling were a totally unforecasted load, but the access center took on the demand. As many access center staff worked tirelessly to contribute to handling demands, institutions were educated on the value of the access center. Centralization proved to be so much more than just scheduling appointments. Access centers became *rapid response units*, able to pivot and handle new and varied demand.

Contact centers have been constantly fielding requests to support new programs. Many institutions have been far more willing to address historically chronic understaffing and have agreed to add staff. As the realization of contact center value continues to be demonstrated, the willingness to invest is magnified. In other words, *the iron is hot*. Consider the enormity of patient outreach, information, and assistance needed for COVID-19 vaccine scheduling. Again, this new demand is being handled by healthcare access centers across the country.

OPERATIONAL IMPACT OF WFH

The operational impact on contact centers as they responded to the pandemic is significant from all angles... people, process and technology. For example, in December 2019, many healthcare systems said that they never would entertain moving the workforce home. Well, guess what? Work from home is now a requirement in many organizations!

WFH has brought about massive challenges. Managers have had to figure out how to manage remote staff, hire/train/onboard new staff, and provide ongoing training for existing staff. WFH has also placed new demands on staff across industries. Many agents have gone from a well-provisioned desktop, dual monitors, ergonomic chair, keyboard, mouse, etc., to a laptop with a 15-inch screen. They navigate poorly constructed user interfaces that create navigation nightmares. Multiple applications are open with varied password resets and timeouts; agents must cut and paste from one application to another. The result is increased handle time, errors and a kind of "disengagement." Complexities of the transaction keep agents from focusing on the human interaction.

Assist and escalation support has become a major challenge for WFH programs. When on-site, agents are able to call upon co-workers and supervisors. This is not so easily replicated when working remotely. Solutions adopted include everything from "Zoom" to "Teams" to "Jabber," etc. Many have realized that their demand stream requires dedicated resources. As well, supervisor-to-agent ratios have had to be adjusted because the remote workforce requires more engagement. Leaders must also provide for those staff still on-site. Many contact centers have maintained some populations on-premise that also need to be managed. These staff either don't have WFH setups or simply choose to work on-site.

During the pandemic, the meaning of "metrics" has also changed. For many, handle time has increased due to inferior

tools. Adherence has increased, resulting in improved utilization of agents. PTO has virtually disappeared for months because people have nowhere to go. The average time to abandon for many has increased as people's tolerance for delay is mitigated by the situation.

The contact center must document all significant changes and conditions resulting from COVID and the pandemic as well as their impact to the organization. Shine a light on specific areas of achievement and excellence… whether they be an innovative WFH program, a consolidation and streamlining of job tasks previously handled by other departments, or the formation of a centralized hub for your organization.

2 Highlight Strengths and Weaknesses

It is important to identify and document operational strengths and weaknesses within the contact center and recommend top improvement initiatives. This activity is especially crucial as we continue to navigate within the pandemic world. Many of the performance gaps that were tolerated during the pre-COVID era are no longer acceptable or sustainable.

For example, contact centers that got by with low or no training budgets/resources or used side-by-side/on-the-job training approaches were lost when it came to training in the WFH model. As well, contact centers with WFH programs face several challenges such as workspace limitations, noise, interruptions, lack of operational guidelines for WFH oversight and lack of management visibility. For many, technologies that enable digital access and self-service are weak and continue to force interactions with humans.

Ask the important questions: *In what areas do you excel? Where are your major shortfalls? What are your top steps for contact center improvement? What are the benefits/liabilities of your WFH program?*

3 Make a New and Different Case to Senior Management

Executives have short attention spans. It is important to keep your pitch simple via the use of bullets, graphics and charts. Be certain to speak executive language. Do not lead with achieving service level or asking for a "box." Tell a clear story.

I recently read a report published by Forrester titled "CX Leaders: Get Funding or Get Fired." The report presented a single sentence "business case template:

> We propose to ___(the project)____ in order to ___(goal)_____; this will bring us an economic benefit of _(savings & earnings)_, at a cost of _(project cost or request)_.

The report also provides an example of a one-sentence business case:

> We propose to redesign our IVR services in order to reduce the number of customers who opt out to a live agent; this will bring us an economic benefit of $4 million/year in savings, at a cost of $200,000.00.

Forrester reminds us that, when pitching to the executive level, it is best to lead with benefits and end with costs. Don't try to make assumptions that are right; make assumptions that are not wrong. Your job is to make assumptions that a reasonable person will not say are wrong.

Now Is the Time to Strike!

Executives across many industries are more aware than ever of the value of the contact center. Contact centers have proven to be rapid response units that are able to bend to even the most unforeseen circumstances and demand. So, *strike while the iron is hot*.

Make sure that it is clear what the contact center requires to meet the needs of the business. (The pandemic disruptions were met in some cases by sheer determination; this is not a scalable or sustainable model.)

The time is now to present a compelling case to senior management for proper funding of the contact center. Take your accomplishments, contributions and requirements for future success to the executive level.

Remember to be successful at that level, you must be succinct. Executives are new to looking at the contact center from a value proposition perspective. Remember to use "strategic" language and link to market share, margins, revenue and brand. That is the lingo of executives. It is unlikely you will be successful if your pitch goes too deeply into the weeds and isn't linked to strategic forces. Think in terms of what it takes to meet the needs of the business rather than focusing on metrics or technologies as the lead message.

You have the rare chance to improve the contact center's standing within the enterprise. Engage your executives and link the operational needs of the contact center to the strategic needs of the organization. Trust me, this newfound glow has an expiration date. As with molten steel… *you must strike while the iron is hot!*



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