

# THE POWER OF PROCESS TO SHAPE CUSTOMER EXPERIENCE EXCELLENCE AND FUEL EFFICIENCY

Look at the bigger picture and proactively engage on all levels.

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Let's face it. Most folks involved in contact centers today are there to help, provide service or sell something. Customer experience excellence is a desirable attribute of these encounters, and excellence has a great dependency on effective "processes."

When encounters are simultaneously efficient and cost-effective... it is quite the business "trifecta." Leaders must recognize that at the heart of customer encounters lies a labyrinth of processes that enhance or inhibit achieving that "trifecta."

For the purposes of this article, let's assume that contact center leaders understand quite well the power of gaining efficiencies by streamlining steps in a task. However, there are broader business processes that leaders need to consider when navigating the

enterprise landscape; these impact not only what they do but how they do it.

The word "process" itself can be a noun or a verb. From my perspective, process is a noun for business leaders ("a particular course of action intended to achieve a result") and a verb as it relates to the front line ("deal with in a routine way"). The contact center's front line is where so many processes architected across all categories converge and impact the customer experience.

Many managers design processes from a task perspective; these are "Operational" in nature. But processes extend well beyond the task level. Strategic or "Institutional" processes center around how decisions are made, how budget dollars are allocated, what technology will be used, how technology will

be acquired, etc. "Organizational" processes drive intangible assets such as people, information and culture.

Let's look at these three process categories—Institutional, Organizational and Operational—and how they impact the contact center.

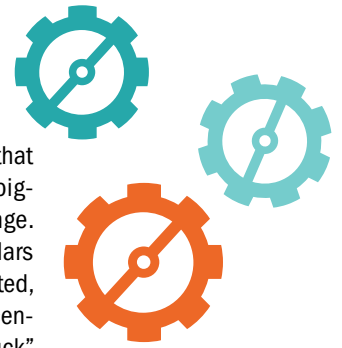
## Institutional Processes

Among the most important Institutional processes that contact center leaders must understand is the way budget dollars are allocated. For some organizations, the bidding process feels like a competitive sporting event! It is in the contact center's best interest to know and thoroughly understand HOW this process works and to gain clarity around what leadership needs to know and do. This is a must in order to get the budget allocations necessary to achieve customer and staff objectives.

Contact center leaders must craft their own processes and learn how to summarize and tantalize regarding the center's value. Reporting on abandon percentage or call duration has little if any sizzle when it comes to budget allocation.

*What is the budget allocation process in your organization?* If you don't have a solid working knowledge of that process, your ability to "lobby" for your share of the allocation is greatly diminished.

It is also at the Institutional level where many "rules of engagement" across the enterprise are established. For example, one that impacts the contact center significantly



is the process of acquiring technology. The process “thread” is often weak in this regard. *What are your processes around technology acquisition? How effective are they?*

## Organizational Processes

People, information and culture make up the intangible assets that are impacted by Organizational processes. And these, in turn, impact our people. As an example, how we hire is largely affected by processes designed by human resources (HR). It is here that requirements, such as a college degree for a frontline supervisor, are created. Contact center leaders have created processes that creatively circumvent requirements such as this.

The hiring process is only outdone by the firing process. (As my daddy used to say, “Easy to get is hard to get rid of.”) The contact center may get “stuck” with marginal performers due to the HR firing process. The list of questionable processes can go on and on. The HR company “rule” that employees will not be considered tardy if they arrive within 15 minutes of the start of their shift simply doesn’t work in the contact center. After all, we can’t put an announcement on the phone that says, “Thanks for calling. We open at 8 a.m. and begin taking calls when our people show up!”

Contact center leaders need a process for working with HR on all matters. HR, like the IT department, serves the entire organization. It is up to contact center leadership to make sure that HR guidelines support the unique and specific needs of the contact center.

Organizational processes also determine staff ratios... how many agents per supervisor. Roles and responsibility assignments are Organizational processes; in some organizations, this is how silos are created.

Organizational processes drive cross-functional relationships. A decades-old complaint is that marketing doesn’t share information with the contact center about campaigns being launched. Yet, the contact center is responsible for handling the customer response. I personally find it incomprehensible that this continues to occur. Does marketing “hate” the contact center? Are they attempting to ruin you? This is highly unlikely. Honestly, it’s worse than that. Marketing doesn’t even think about the

impact on the contact center because there is no process in place. There are no “steps” in the marketing process to engage the contact center. This is not the sole responsibility of marketing. Contact center forecasting efforts need to include a routine touch base with marketing in its planning process to understand the scope of upcoming events and plan accordingly.



“  
Be a yardstick of quality.  
Some people aren’t used  
to an environment where  
excellence is expected.”



—STEVE JOBS

## Operational Processes

A bird’s eye view of Operational processes is available in the contact center. Take a long hard look at an agent’s user interface. The interface is the ultimate example of an operational process. When the user interface is cluttered with various applications that require ongoing password resets, dealing with time-outs, cutting and pasting, and rekeying information, it is abundantly clear that there is a process problem. *But where exactly is that problem?*

When you look at it head-on, the “Operational fix” may be easy to see... a smart desktop with single sign-on could solve this problem. Great! This is one level solved, but ONLY IF the contact center is successful in making the budget case to senior management to acquire such a tool.

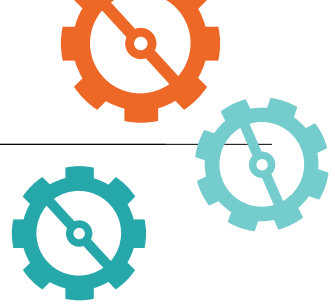
Budget allocation is where the Institutional process impacts the Operational. This is the

true process that poses the biggest challenge. If budget dollars are not allocated, the contact center gets “stuck” with a complicated desktop that strangles efficiency and compromises quality. Some agents must concentrate so intensely on transactional complexities that the interaction is compromised. This is NOT a plus in the customer experience excellence column!

An additional Institutional process that contributes to the desktop complexity issue is IT’s willingness to allow a cluttered and complicated user interface to exist at all. This is particularly critical in an area of extremely high customer contact that is greatly impacted by an inefficient interface. Don’t get me wrong. IT is not trying to do damage. There are competing priorities, and for the most part, IT lacks expertise in the finer details of provisioning contact center technologies.

The IT issue was illuminated when COVID forced many contact centers into an emergency work-from-home (WFH) model. Agents were sent home with a laptop determined by IT to fit the agent’s need. Well, it may have met the need from a plug-and-play perspective. But, the agent left behind large dual monitors, an external mouse and an ergonomic chair. Many were now sitting who knows where in their home with a 15-inch laptop screen and navigating across multiple applications on a touchpad. Guess what? In far too many places, call duration soared as agents attempted to navigate this tapestry of complexity while striving to meet the caller’s need!

Sometimes it requires building your own new processes to encourage more effective cross-functional alignment. One e-commerce operation stumbled upon an opportunity to educate IT when an executive mandate had IT resources (as well as other departments) “fill in” in the contact center during the holiday season. Once IT had to use the contact center system, it had a new appreciation of the issues and worked diligently to streamline the interface. Not many will have such an opportunity. Consider looking to build a new process to communicate cross-functionally



before issues arise. Befriend IT and make sure your needs are clear. Work toward the shared goal of delivering an excellent, effective and efficient customer experience.

### Look at the Bigger Picture

Learn to articulate the Power of Process to enhance the experience of agents, management and business partners. Consider the importance of developing formal processes to assure cross-functional communication. This is the basis of collaboration and a requisite to gain efficiency. Established internal processes are unlikely to change much; the key is for the contact center leaders to weave their needs into the existing processes.

Customer experience excellence is a great marketplace differentiator. But it is only sustainable when supported by all elements



within the enterprise. So, when you think about the Power of Process, move beyond the mere steps in a task to gain efficiency and consider the opportunities that will emerge when the contact center is part of all the decision-making processes. Look at the bigger picture and proactively engage on all levels... Institutional, Organizational and Operational. ●



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