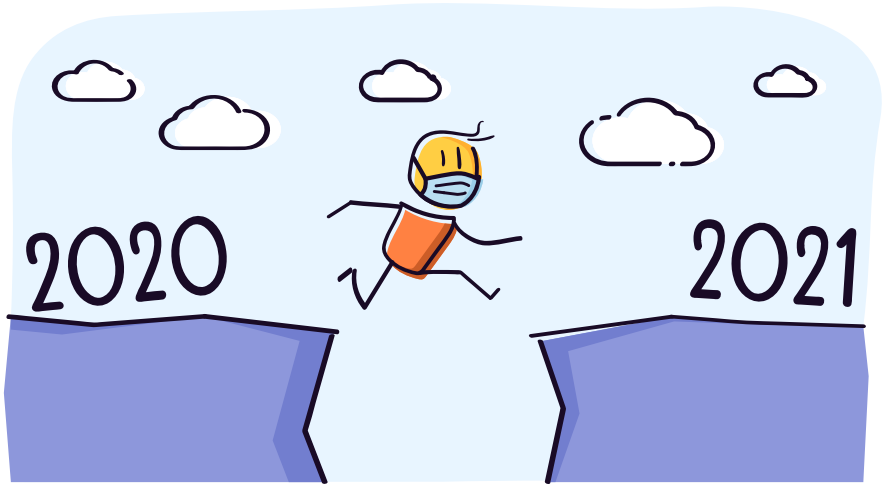
GOODBYE 2020… LESSONS LEARNED

Observations on leadership, technology readiness and supporting WFH agents.

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I wish I could say, "Hate to see you go," but that is definitely not the case. I believe that each of us has been bitterly disappointed by 2020. This year, holding the promise of a new decade will be remembered as dark and dangerous for generations to come.

I wonder what the writers of "Back to the Future" knew when Doc warned Marty, "Whatever happens, Marty, don't ever go to 2020!"

For the record, my 2020 began with emergency back surgery, which was fabulously successful. I returned to work on March 2nd, and by the 9th, shutdowns in the Northeast began. All social venues and schools shut down. Many began to work from home, projects stalled, and new and novel initiatives began. The verb "zoom" took on new meaning.

As an advisor and observer of many organizations, I have seen them navigate through crises that caused massive disruption. I'd like to share a few of the lessons I learned.

Disruption Exposes Strengths and Weaknesses

Many organizations have faced major obstacles due to the disruption and impact of COVID-19. I don't know of any company that previously had an actual operational "pandemic-level" disaster recovery/business continuity plan. Most had bare-bones disaster recovery plans that were sufficient for very temporary incidents, such as weather alerts or building emergencies, but insufficient for a long-term pandemic situation.

My observations say that leadership has been the greatest strength, while technology "readiness" the greatest weakness. Leadership at every level in the contact center world has been under enormous strain. The launching of work-from-home initiatives has been the most visible, as businesses sought to manage massive changes in demand.

Some operations exploded. Many e-commerce operations faced what they now call a second "season" when their demand shot up to Christmas season levels without the opportunity to plan. Others went from busy to zero in a matter of weeks, forcing layoffs, shutdowns and bankruptcy. Throughout all this, leadership has faced mighty challenges.

The good news is that contact center "people" deal with change and disruption a lot. I, for one, think that this mess has brought out the best in many. The evidence is that the job got done because it had to get done. Many leaders in organizations that have not survived put some exceptional talent into the market. Another unimagined benefit is that C-suite leaders are getting a bird's-eye view of the value of their contact centers. They now have insight to their former "benign neglect."

But what about technology readiness? I spoke with one leader whose contact centers were all offshore. Well, those operations shut down completely. There is little (if any) work-from-home in India and the Philippines, so their U.S. operations launched an all-hands-on-deck training initiative. They put every U.S.-based resource on the phones, including the CEO and CIO. Both determined promptly that contact center systems and tools needed a major upgrade to improve navigation and efficiency. This was a big gain for their offshore partners when they returned to work. Sadly, we don't all get the chance to put the CEO in an agent's seat; if we did, many of these gaps would close really quickly!

In 2020, technology readiness played a major role in the contact center's ability to respond to the demands of the pandemic. Many were caught without the necessary system elements that facilitate work-from-home (never mind the plans). There were weaknesses in some organizations due to their phone systems, networks and the abundance of hardware and software to be deployed. Those that had moved to the "cloud" clearly had cause for celebration… their journey was strengthened in some key areas.

Many weaknesses, however, had little to

do with whether you were a cloud- or premise-based organization. In many cases, the weaknesses had less to do with getting the call to the remote agent and more to do with whether the agent could be successful without the support of the on-site "village."

When you think about it, even those organizations that struggled with technology weaknesses and the deployment of work-from-home navigated that weakness with the strength of leadership.

Lessons Learned

HIRING

For the first time, many growing organizations had to engage in remote hiring. Video interviews replaced face-to-face and many tackled another technology gap. Those involved in the process often had no cameras. Yet again, they had to compete in the market as they became "ready" to engage in the hiring process remotely. Learning to conduct remote interviews highlighted the value of having interview guides, candidate assessment tools and hiring protocols to maintain an equitable process. Learning to interact "on camera," well, that's for another article!

TRAINING

Onboarding new staff meant learning to transform all training programs into remote platforms and to adjust delivery approaches. Many contact centers had no software to assist with necessary revisions, changing formats, etc. Others managed to do remarkable work using video tools (e.g., Zoom, Webex) once everyone got their cameras! Organizations are learning that they must make technology investments to support training for both new-hires and existing staff in WFH operations.

KNOWLEDGE BASE

In the remote environment, knowledge base/information systems are critical. Yet, for many, they are inadequate. We have observed agents collecting their personal "knowledge base"... Post-it notes, printouts and well-worn job aids... from their cubicles as they prepared for work from home. For many organizations, a knowledge base is often a collection of FAQs presented in dense paragraph form. Information is often out of date and rarely provides step-by-step support for system applications used to solve customer problems. Knowledge base design for contact centers must consider the "time to solution" factor. While others in the enterprise may be able to take the time to read through FAQs and other content, contact center agents have callers on the line NOW. They need "knowledge technology" architected as a guided conversation tool. This is more a knowledge escort than an encyclopedic knowledge base.

> "Toast to the lessons not yet learned and to the trials that will teach them."
>
> —BROOKE FRASER, SINGER AND SONGWRITER

The lesson learned is that on-demand knowledge is of critical importance to all agents and especially critical to WFH agents. The most important lesson to learn is how to get the enterprise to make the investment. Generally speaking, improvement in this area is relatively easy to track. This includes decreased training time, improved proficiency post-training, more efficient handle time and reduced errors. All add value to the organization.

ASSIST AND ESCALATION SUPPORT

A well-architected knowledge base/guided conversation tool provides timely, clearly written and accurate information to contact center agents. However, they often need more.

The contact center on-site "village" provided a live knowledge base. Agents could interact face-to-face with peers, team leads, supervisors, trainers, etc. This sufficiently subsidized any weaknesses in the knowledge base. But take away the village and poof... a clear gap!

When agents really don't "know" (and have exhausted all resources), where do they go for answers? Who can handle that escalated call? The fact is technology isn't the only weakness here. Within many contact centers, the organizational structure lacks the human bandwidth required to handle the "assist and escalation" demand of a remote workforce. Particularly with a newly hired remote workforce. This demand needs to be handled in a formal fashion, via the creation of an official assist and escalation queue, which, of course, must be staffed properly to be successful. Some assign by rotation, supervisors, team leads, senior agents, etc. This queue creates a clear data stream to track demand and staff accordingly, and when queries are documented, the ability to track performance.

In premise-based operations, this demand has been a nearly completely un-forecasted load. We now know that, in the "village model," agents help one another in a ton of ways that must be replicated if WFH is here to stay.

Top lesson for me: When agents don't have what they need, can't escalate a call or receive an accurate answer, these become real customer problems. Customer problems become the contact center's problems; they merit the investment in tools to overcome and ultimately eliminate those problems.

Successfully Managing Change and Lessons Learned

Finally, consider that many organizations have successfully managed major changes without the benefit of endless meetings, overblown analytics and 10 rounds of ROI. Many achieved and celebrated mighty operational feats without the necessity of Six Sigma, Lean Six Sigma and other process improvement methods. I advocate the RUYS model—the Roll Up Your Sleeves method that has produced many stunning results.

Take a moment to congratulate yourself. We have all learned so much in 2020. But I do hope that 2021 is really, really boring. Stay safe, be healthy and Happy New Year!



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