

HEIDRICK & STRUGGLES

Transforming customer service in a call center

By changing the mind-sets of its frontline staff, a Fortune 100 company was able to liberate itself from the shackles of information technology.

Changing the behavior of call center employees in a relatively short time at minimum cost is no small feat. The following case study, drawn from a real-world example, shows how a front-line team can work to inspire a dramatic mind-set shift across a service division. At a higher level, the case illustrates how a company can manage an information technology transformation without being restrained by the technology itself.

The challenge

At their most basic, call centers exist to serve customers and sort out their problems in the most efficient way. Yet too many companies focus on efficiency metrics (say, call resolution and average handle time) at the expense of business value.

That was the worry of the chief operating officer (COO) at a big division of a Fortune 100 company. The company had started the budgeting process for a new customer relationship management (CRM) system, and the COO wanted to ensure that once it launched—in a year—that it would help enable the customer service function to become more of a value-added partner to the main business.

Such a goal would be challenging to achieve. In the past, the company would have bought a CRM system

and managed the business according to the way the system was configured. This time, the COO said, “We want to transform how we manage our business. This is what the CRM system has to capture. Let’s either build one or buy one that will allow us to run the business in a very different way.”

Up to that point, the company had done little to mine and develop insights from contact with customers through the call center—a missed opportunity, in the view of the COO. The current, and typical, call center approach focused on how quickly a representative could answer a question and get off the phone. The COO’s aspiration? While you’re on the phone, think like a businessperson—don’t respond like someone who just needs to solve a problem and hang up.

“What if we could rethink the customer service function to elicit more interesting information, provide more interesting analysis, do more thoughtful reports, and then offer input to our sales and retention staff in a way that could spur business?” the COO asked. “We could deepen our relationship with clients. We could have early-warning indicators if they’re thinking about defecting. We could truly know them in a very different way than we’re knowing them today.”

So the COO laid out the challenge: quickly develop a blueprint for a CRM system that would capture the information needed to transform the customer service function from a traditional call center mentality to a value-added business partner. To do so would require a mind-set shift across the customer service division. Call center representatives and their managers would have to open themselves up to the “art of the possible.” Many companies have tried to carry out a similar transformation, but far fewer have succeeded because of the difficulty of changing mind-sets.

The insight

The COO assembled a seven-person team of frontline staff, including call center representatives and managers, with a range of functional roles to explore what information the CRM system would need to achieve the goal. As a first step, the team interviewed about 50 people from the business lines that could benefit from deeper insight, analysis, and reports derived from customer service interactions. Among the questions the team asked: What kind of information should the reports contain? How often do you want them? Should they be hard copies or electronic? If you could get these reports, what could they really do for your business line?

In response, the salespeople said they would like reports showing trends. They wanted graphs. They wanted leading indicators of customer defections. They wanted insight into what other products customers might want to buy, based on the questions they were asking the call center representatives. In fact, the team got hundreds of requests, which it distilled into 20 categories.

The team then built a giant spreadsheet with about 1,000 cells, sorted into the 20 categories. This spreadsheet served as a record of the kind of data that call center staff would need to capture from

customers or other databases to generate the requested analyses or reports. The team found that data already existed for 100 of the cells; data were available but not in usable shape for another 400 cells; and for the remaining 500 cells, the company did not capture this data at all.

This was the first time the company had undertaken a detailed exploration of these sorts of data requirements. The amount of data needed was intimidating, as was the challenge of collecting it in a thoughtful way that wouldn't upset clients. Half the team went to work developing a script that would guide a customer service representative's interaction with a client in an attempt to fill in as many of the blanks as possible.

The other half tried to answer the question, "If all the data were obtained in a timely and accurate fashion, could we produce the analysis and insights the rest of the organization wants in a cost-effective way?" To its delight, the team found that if the data were available, the call center could generate almost 90% of what the rest of the business wanted in a timely, inexpensive way.

After a week's work, the team took its spreadsheet and script into the field, offering two hours of training to select customer service representatives. The team chose representatives who were well respected by

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colleagues and might become advocates for the new approach if they approved of it. Team members categorized customers by the kind of requests they might make and then, depending on the question asked, counseled the representatives to try to obtain specific pieces of information. In some cases, the company's call-routing software gave the representatives an idea of what the inquiry was about before they answered, a standard call center feature.

The pilot proved successful. The representatives were quite open to the change in approach—they appreciated the opportunity to play a bigger role in the success of the company. The representatives found that they were able to capture almost all the data needed to produce the reports. Some information was publicly available, so it could easily be filled in. Other information came from existing reports and was simply repurposed. Most of the rest was new information, and it came primarily from the clients in the course of a telephone call. The representatives' script was well written and not viewed by clients as intrusive or heavy-handed. The importance of this point can't be overstated—any interaction that customers find uncomfortable damages the client experience. And the new data could be obtained without keeping clients on the line much longer than before.

The result

The team completed its work in a month. After the pilot ended, the company bought the CRM system. Knowing what it wanted—and what it didn't want—from the system reduced how much time it took to negotiate the purchase as well as its cost.

"This may be the first time in our firm's history when we are not going to have to change the way that we as an organization want to operate because of technological constraints," the COO said.

"Rather, we can shape technology to work the way that we want to, to best serve our customers." The CRM system is now in company-wide use, and the call center representatives are generating the kind of reports for the sales staff that the company had hoped to see.

Viewed narrowly, this case is an example of a company expanding the responsibilities of a customer service unit. In a broader sense, it illustrates how a company can change the mind-set of its frontline workers in a comparatively short time and at modest expense to help introduce novel information technology approaches. ■

About the author

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