

CALL CENTERS AND BEHAVIORAL CHANGE DYNAMICS

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Introduction and History:

As call centers have finally begun to take serious actions to protect their profits many existing and new methodologies and tools are being deployed to drive the necessary changes in work processes and procedures to realize the benefits. The context of how we view call centers varies with our job responsibility and function. For example in a Sales capacity we might want to be able to sell certain flow down attributes of our call center to potential customers. In Marketing and Public Relations, we might use our initiatives to improve our brand standing. As employees we might simply want to do the “right thing”. From a business perspective, we should be looking for lower costs for the long haul.

It is important to get back to some basics about how to effect long term, sustainable quality in call center operations. Otherwise we will experience limited success, rework, and unnecessary expense by performing in “trial and error” mode in pursuit of our goals.

Conferences, Work Shop’s, Training Programs, Seminars and countless meetings are conducted to help us understand the Critical Success Factors and methods to implement initiatives effectively. In the end however there will be leaders and laggards when the history of this is written. The leaders will undoubtedly display characteristics that they learned from previous initiatives (both successes and failures). The laggards will take short cuts, practice passive management and pay lip-service to important attributes.

What history has taught us is fairly simple to grasp but more difficult to implement. So the question becomes, does your organization want to be a leader or a laggard.

Some Fundamentals:

The following is designed to provide a strategy and practical steps to integrate important Change Management Dynamics to assure efficient, effective and lasting performance results in call centers of all sizes.

1. Process + Behaviors = Performance

The context of this simple notion is well known but not always fully understood, considered and used for planning and execution.

Why?

Simply put, we know more about the science of processes, services and products than we do Human Resources and Change Management.

Why?

Perhaps Engineering and Science is more fun and easier to spend money on for a necessary and tangible result (Product and Process Development, for example) After all, there are many more Engineers, Scientists and Service Professionals in a typical organization than Human Resource Professionals.

So, we could have very well designed robust processes that do not yield the desired or optimum performance outcomes.

Why?

For a number of reasons, the behaviors of the people interacting with the work processes, are either not properly motivated, have conflicting priorities, are poorly managed, do not have the requisite skills and knowledge, and / or all of the above.

Why?

Their managers and the strategy in general did not consider what they were doing and why they were doing it before the new initiative came along. They may have also had organizational disconnects between what the company strategy was originally intended to do and what the new initiative was hoping to do. It probably was not integrated, just added in.

What can we do?

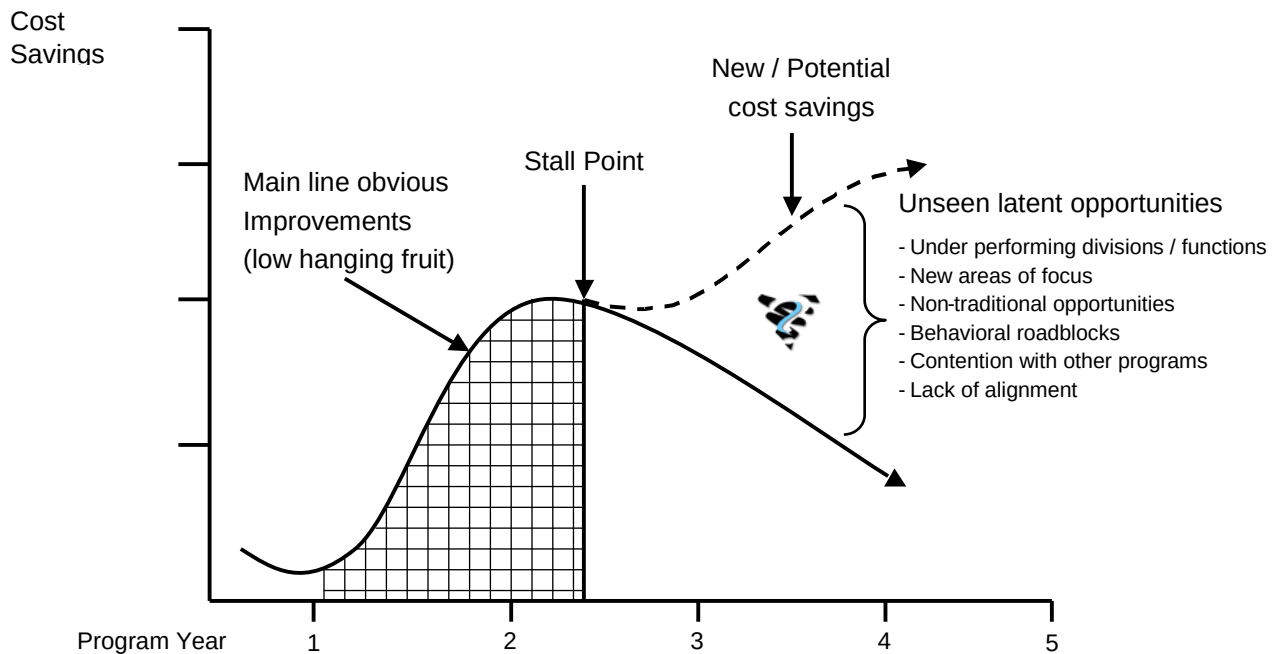
Acknowledge that work processes and procedures alone, can only be as effective as the enabling and motivating processes driving individual's behaviors. Consider this and then plan accordingly to first understand and characterize current behaviors or the "Current Reality" and then align, adjust, communicate and implement these processes for success. Be sure to look for conflicts in procedures or poor alignment between all processes, initiatives and programs in practice.

2. Cause and Effect

By nature, individuals and organizations react to changes in performance outcomes, good or bad. The focus on results or *effects* is a strong lure, satisfying the instant gratification needs of many of us. Undo focus by management on lagging indicators and the need to satisfy quarterly performance requirements add to this fixation. If employees are not properly trained and disciplined in a problem solving science, their first notion is to fight the obvious fire first, and ask questions later. This drives organizations into a reactive mode focused on the *effects* (or outcomes) of the issue under scrutiny. This is a common behavior trait, even in parts of high performing organizations.

As you approach your call center, there is risk that undo focus on the desired *effects* will create a Hawthorne Effect (quick result due to excitement and focus on something new). These effects are often not sustainable and could wane over time if true root causes are not addressed.

Figure 1 – Initiative Performance Stall



These behaviors create inefficiency in problem solving and process implementation (as focus drifts away from true *root causes*) and teams become enamored with ad-hoc, “trial and error” quick fixes. These resources become conflicted when faced with implementing something new as happens every day in the typical call center environment. They struggle to see the linkage and alignment between what they perceive as the “important” work (related to their performance outcomes) and something new that management has decided to pursue. i.e. a new product to sell or support

This is something that is driven by the lack of (or awareness of) pertinent facts and data that differentiates *causes from effects*.

What can we do?

First, we must make performance outcomes and their associated measures concise. Too many confuse an organization and set up prioritization problems. Too few and / or too general creates a lack of granularity. The measures need to be carefully aligned to the goals of the organization, the business strategy and critical success factors.

Second, clearly communicate the rationale for the current level of performance and the goals to the organization. Be careful to relate performance to business success and strategy. This process should be continuous and not an annual event.

Third, reinforce and demonstrate that the way to positively affect these measures is to look behind them at detailed contributing data or *causes*. Do not reward people for firefighting *effects*. Encourage and recognize the accomplishments of individuals and teams who use data and a valid problem solving technique to assess and resolve *root cause*. Be sure that measurement systems and data are accurate, available and easy to access.

3. Perception vs. Reality

Many managers fall into the trap of believing that they know what is *really* going on in their organization and processes. It's an easy trap to fall into with all of the pressures, priorities and programs to manage and keep aligned. We often forget that our employees, with pressures of their own to perform, will create innovative ways to do their work despite the guidance of policies, procedures or work instructions. They will sub-optimize how they do their work to deal with conflicting priorities, resource issues, breakdowns or old habits.

Periodic audits may help (if conducted properly) but tend to focus more on compliance (which in a way can be a punitive approach). Employees faced with responding to auditors questions and probing will most often try to give the "*right answer*" as opposed to the "*real answer*". Managers may even attempt to steer the audit process to areas or people who are higher performing or more experienced. All of these factors create error in the measurement system and contribute to the false positive of an audit pass condition. And worse, trying to be a good manager we will celebrate this "success" and reinforce the *behaviors*.

Not that all audits are bad. How they are prepared for, conducted, executed, communicated and followed up on will govern their accuracy and contribution to success. As they are most often centered on comparison of work practices to standards, they run a high risk of missing the behaviors (or *causes*) for non-compliance.

What can we Do?

Discover the "Current Reality" of behaviors and process work performance in your call center. Admit that you can not possibly know everything that is going on and why. Understand that despite the best process design and detailed work instructions, other factors are driving work behaviors. In a perfect scenario you should attempt to characterize these issues as a part of the design of your call center.

Web Technology has introduced new and more efficient ways to query employees, customers and vendors about why and how they do their work, make decisions and help to explore the underlying behaviors within their work performance. This provides us with a methodology to quickly and efficiently query large populations (as opposed to small samples), encourage people to answer honestly (by creating a confidential query mechanism), and quickly perform analytics and comparisons to identify gaps in desired behaviors. These tools are quantitative in nature and can initially provide a baseline score for desired vs. actual behaviors related to performance. The analytics will allow for a rapid "drill down" into these behaviors to see causes. Actions can then be taken to address these causes and keep the initiative on course. Over time, the assessment may be run again to provide the current performance against the original baseline and be sure that new issues have not crept in.

Summary:

There are many stories and case studies related to the successful operation of call centers. Some will deal in very detailed technical topics and others will deal with implementation strategies. Others still will focus on new methods and success stories. At the end of the day, the success and longevity of a call center will be determined by the underlying behaviors of its participants.

Successful organizations that assess, measure and understand behavior drivers will have a significant planning and execution advantage. By characterizing the drivers of organizational and individual behavior, relating those drivers to needed changes, associated procedures, processes and initiatives, and aligning those processes to eliminate conflicts in work performance, “Best in Class” organizations will assure that their call centers will be effective, efficient and a significant contributor to overall business success.

About the Author:

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