

Gaining the Customer Advantage through Effective Call Center Staffing

©copyright by Robert (Bob) W. Lucas

Call Center Representatives (CSR) have quickly become a crucial component in many organizations. Call center employees are often the first, and only, organizational representative with whom a customer interacts. With this contact can come a perception of professional excellence or ineptitude depending on the CSR's success in handling a customer or situation. In many cases, organizations have come to recognize the importance of such workers and spend large amounts of money and effort in providing state of the art equipment, training, and incentives to recruit, hire, train and retain qualified employees. One way of recognizing the importance of CSRs is to think of the organization as an inverted pyramid where they lead the organizational effort in customer satisfaction.

Depending on the organization, members of a call center may perform tasks specific to that business or industry or may provide more generic functions; however, in addition to providing key customer contact functions, a typical call center employee handles many fairly routine processes for an organization. Depending on the size and mission of the organization, these functions --- order fulfillment, technical support, or application processing --- are often enhanced with a variety of specialized units within the call center (e.g. foreign language specialists, technical experts, and product specialists). Each unit performs a specific task, serves a particular customer base, or supports a certain product or service line. Some typical call center job titles are:

- Account Executive
- Agent
- Associate
- Attendant
- Consumer Affairs Counselor
- Consultant
- Customer Service/Member Support Clerk
- Customer Service Representative (CSR)
- Data Entry/Order Clerk
- Inbound Telemarketing Specialist
- Member Counselor
- Operator
- Outbound Telemarketing Specialist
- Sales Representative
- Senior Customer Service Representative/Member Counselor
- Technical Support Representative (TSR)
- Teleservices Representative (TSR).

Typical Call Center Services

Opportunities to apply technology continue to grow each day, as do the types of services that can be provided through call centers. Based on the industry, type of products and/or services provided, size of the organization, management approach, and resources available, organizations can continue to grow and enhance their level of service.

The following list contains some of the more common customer service and related functions provided by call or customer contact center employees.

- *Billing support.* When customers have questions about a billing statement charge, interest rates, or other related topics, they can usually call in to speak to a service representative for information or log onto a company website.
- *Collections.* Many organizations have in-house (internal) agents who call delinquent customers in an attempt to have them pay past due accounts. Other organizations (e.g. banks, credit card companies, credit lenders, and similar agencies) will sometimes sell their delinquent accounts to third party collection agencies in exchange for immediate cash recoupment. The third-party agencies are the ones that then follow-up with calls and letters to collect the debt.
- *Complaint resolution.* Complaint handling used to be provided by a customer physically traveling to an organizations complaint or customer service department or via correspondence (postal mail as it is now called). Today, most organizations provide access to a customer service representative through telephone, facsimile (fax), mail, or the Internet in order to allow discussion of a problem related to a product or service provided by the organization. By offering multiple alternatives, customer needs and preferences can more readily be addressed. Additionally, depending on the method chosen by the customer, time and money can be saved by the organization since technology can often replace the need for employee intervention.
- *Document/order processing.* Organizations that deal with a membership base, or process forms, orders, or applications generally allow several ways for customers to accomplish these functions (e.g. warehouse clubs such as Sam's or COSTCO, credit companies, mortgage companies, organizations that do product warranty registration, or order processors). Customers can either mail in a form, go online and complete it on a Website, fax it in, or call to have an agent of the organization take the information and complete the form for them.
- *Inquiry services.* Some organizations program responses to frequently asked customer questions (FAQs) into a system that can deliver the answers electronically via a Website, through Fax-on-demand, Interactive Voice

Response (IVR), or On-line Internet Fulfillment systems. These systems will be explained in more detail in the following section.

- *Telemarketing or teleservices.* Such employees might be internal or contracted through another organization. Their role may be outbound calling to sell products or services or inbound call receivers who answer customer questions about current products and services being used, with an attempt to cross-sell or up-sell the customer to an additional or higher level/priced product or service. Among other additional functions performed by CSRs in these positions are prescreening possible customers or setting up sales calls for sales representatives.
- *Technical Support/Help Desk.* Virtually every organization that develops products (e.g. electronic equipment, software, electrical appliances, and craft tools) or offers services now provide a toll free number for customers to use for accessing information and assistance related to assembly, use, warranty registration, benefits, and various other functions. In many cases customer services are provided by employees of the organization making the products or selling services, however, in numerous other instances the responsibility for customer service is subcontracted or outsourced to a third-party vendor (service bureau). Such third-party companies often provide similar help desk services for multiple clients. For example, many of the software help desks that customers call for assistance have units set up within their call center to handle customers for a variety of software manufacturers.

The staff of such third-party vendors is typically trained on the client organizations' products and services. Customers calling in usually never know they were speaking with a third-party representative since these call handlers answer with client's product company name.

Typical Customer Contact Representative Competencies

To perform well in a call center, employees must possess some very special competencies or capacities or abilities to perform certain tasks. Because of the specific requirements of the job, organizations must look for candidates possessing as many of these competencies as possible. Foremost, it is essential that call center personnel have strong interpersonal skills, be organized, able to problem solve, and have a strong sense of the importance of their function to the organization. It is through possession of these skills that successful call center employees can deliver quality service to customers who are historically used to more face-to-face, personalized service. Computer systems and other technology are only designed to process, transmit, and store information. It is the personal element and the competencies that call center representatives possess that determine the ultimate level of service delivered to the customer.

To make sure that employees have the requisite knowledge and skills required to effectively interact with a variety of customers and situations, it is important that

applicants be screened for service related competencies. The following are some common competencies/abilities that employers look for in applicants desiring to work in a call center:

- *Business acumen* (understanding the relationship between their jobs and how the business and customers are impacted);
- *Call management* (controlling a call through effective communication technology);
- *Change management* (adapting to and handling changing situations and environments);
- *Conflict resolution* (using effective interpersonal skills to resolve conflict situations);
- *Cross-selling* (selling upgraded or additional products to existing customers);
- *Decision-making* (gathering and analyzing then applying appropriate interventions to resolve an issue or come to a decision);
- *Interpersonal communication* (ability to actively listen, question appropriately, provide feedback, and use the skills outlined later in this course to build customer relationships);
- *Managing diversity* (knowledge and ability to interact with a variety of people in the workplace);
- *Managing stress* (maintaining a calm demeanor and mental state when situations and emotions escalate to higher levels);
- *Multitasking/managing multiple priorities or assignments simultaneously* (e.g. receiving customer information over the telephone, while inputting/searching for data on the computer);
- *Negotiating effectively* (effecting win-win outcomes);
- *Organizing information and data* (ability to assemble and maintain information in a logical file system that can be accessed by themselves and others);
- *Peer coaching* (offering support and guidance to co-workers);
- *Problem-solving* (identifying root causes through questioning and applying appropriate interventions to address them);
- *Teaming with others* (ability to work effectively with others and contribute to team task accomplishment);
- *Technical literacy* (basic knowledge of computer usage, Windows® applications, email, and Internet and the ability to learn organization-specific software --- requirement varies based on level of technical competence needed by an organization);
- *Time management* (ability to use available time and resources to address assigned tasks and customer issues);
- *Using call center technology* (e.g. computer, facsimile, printer/copier, database software).

The bottom line in a successful call center operation is for managers and human resource personal to view the function as vital to the organization's success. They must then set out to recruit and hire those employees with the qualifications to succeed.

Extracted from Lucas, Robert. W., How to Be a Great call Center Representative.
AMACOM, New York, NY 2001.

Bob Lucas B.S., M.A., M.A, CPLP is an internationally-known author and learning and performance professional. He has written and contributed to thirty-one books and compilations. He regularly conducts creative training, train-the-trainer, customer service, interpersonal communication and management and supervisory skills workshops. Bob can be reached at blucas@robertwlucas.com or through his website www.robertwlucas.com. Follow his blog at www.robertwlucas.com/wordpress and like him at www.facebook.com/robertwlucasenterprises