

Customer Service Knowledge Base

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The Situation: In order to improve the customer service experience for its citizens this Canadian municipality established a Customer Contact Centre. A forerunner to 3-1-1, the service gave citizens one-number access to a live operator equipped to handle a wide range of inquiries and service requests. Since inception the Customer Contact Centre had grown to handle well in

excess of 500,000 citizen inquiries annually. With 80% of calls handled in 3 minutes or less, every second mattered in providing a timely, accurate service response.

Key Issues: As the call volume grew, it was becoming painfully evident that the information needed to respond to citizen inquiries was held in too many different forms and locations. Accessibility was becoming a problem, and that was leading to several concerns:

- ❑ Inconsistent information given to members of the public
- ❑ Extended call handling times while seeking information
- ❑ Overburdened resources resulting in call abandonment rates in excess of 10%.
- ❑ Up to 20% of calls were transferred out to other departments because the Contact Centre representatives did not have access to the information needed to satisfy the inquiry.

In short, the effort to maintain and access information was impairing service to the public.

Engagement Summary: The Customer Service Division engaged me as Solution Architect to guide development of a comprehensive, scalable solution that would replace existing information retrieval tools. Working with the contact centre management and staff, IT staff and external resources the project unfolded in three phases.

Phase I — Analysis:

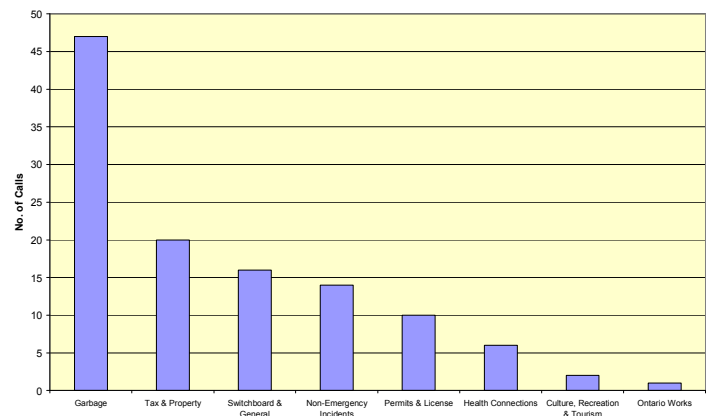
- ❑ Document current state in terms of call types, duration and information retrieval problems
- ❑ Quantify the potential for increased call throughput through reduction in information retrieval time
- ❑ Document functional specifications for a knowledge portal solution

Results of interviews, focus groups and observational sessions provided a logical hierarchy for classifying calls by subject matter. As well, we were able to identify

specific root call handling patterns linked to information retrieval that were contributing to uneven service delivery. Examples include:

- ❑ **Highly individualized search and retrieval strategies** that customer service representatives had devised in order to find information they trusted.
- ❑ **Know-What vs. Know-Who** – Lack of clarity about service objectives led some representatives to work tenaciously to find answers while others would transfer difficult calls quickly to the most probable information source.
- ❑ **Handle vs. Transfer** — The lack of defined escalation rules was leading to inconsistent handle times and uneven service.

Total Calls By Category



Phase II – Functional Design:

The main goal was to create and deploy a scalable knowledge base that would give front line staff quick access to consistent information. Five design principles were set as guides for detailed development:

- ❑ **Call Types** — A distinct topic that requires a distinct response is the basic building block for handling customer service calls.
- ❑ **Call Categories** — Group topics by similarity of subject matter, not the responsible department.
- ❑ **Leverage Existing Resources** — Use design elements that make it easy to find information that is maintained by others.
- ❑ **Business Self-Sufficiency** — Contact Centre personnel should continue to own and manage day-to-day administration of content.
- ❑ **Apply Best Practices for Intranet Design** — Design and deploy a solution that a system that people will actually use.

Phase III – Solution Deployment:

Microsoft Office SharePoint Server 2007 (MOSS) was selected as the technology platform for deployment. This provided a rich tool set that would enable the contact centre to deploy the site in stages, gradually releasing new templates, sections, search tools and other features as incremental changes.

Initial work with the design team established a functional scope that was represented as a series of wire-frame diagrams that modeled the layout of the site and set a framework for the user experience. Key information elements included:

- ❑ **Call Handling Scripts:** Custom template of pages organized into a menu hierarchy)
- ❑ **Hot Topics:** List of headlines and text positioned on the home page to give updates on current high volume inquiries.
- ❑ **Events:** Calendar of events maintained by contact centre staff to record events and activities across the city as well as links to event calendars maintained by other agencies
- ❑ **Schedules:** Calendar presentation of shared Outlook calendars maintained by staff in Public Works department.
- ❑ **Reference:** Document library of frequently accessed documents.
- ❑ **Bulletin Board:** Blog space for Contact Centre representatives to post information about frequent calls and related topics of the day.
- ❑ **Search:** Relevance-based search functions using MOSS search engine tuned to return call types ranked by relevance.

A key feature of the site was a standardized template for call-handling scripts. Developed in collaboration with an end user team the template made it easy for contact centre representatives to contribute scripts for each Call Type in a standard format that included clarifying questions to ask, information to provide and a clear escalation point.

A workflow sequence attached to the template enabled supervisors to review and edit content prior to publication on the site. As well, representatives could attach comments and suggestions for improvement to a script once it had been published into live production.

Call Template

Benefits:

The site was launched in the fall of 2008 after a development cycle of eight months. About half of that time was generation of the call handling scripts by the customer service representatives themselves. Several hundred scripts were generated up to the point of launch; that number has since increased to over 1,000. Specific, tangible benefits include:

- **High level of end user acceptance** with rapid adoption of the new site by all contact centre staff as a primary information retrieval resource.
- **Extension to other customer service personnel**, most notably counter staff in the city's municipal service centres.
- **Decrease in transferred calls**, with a corresponding increase in the proportion of calls handled within the contact centre.
- **Improved Call Handling Efficiency**, with an increase of 20% in call volume since launch with no increase in staff

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The knowledge portal was a team effort that included Contact Centre Management and Staff, IT staff and contract specialists. **Bill Neaves**, principal consultant at DMA Systems, served as Solution Architect and project leader throughout analysis, conceptual design and solution deployment. Specific contributions included overseeing design activities, procurement of hardware, software and services, and liaison between all of the stakeholders involved. For more information please contact us

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