Call Reduction Strategies That Work

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I could tell by the caller-id display, that the person on the other end of my ringing phone was my toughest customer — the Chief Financial Officer of the largest business unit serviced by my Customer Support Center. He was tough in that he demanded a lot. He always wanted more, wanted it faster, wanted it cheaper, etc. It was budget season, so I knew instinctively what he was probably calling about. I answered the phone cheerfully, as usual, and asked what I could do for him today. His response was quick and to the point: "I want your Support Center expense line item on my monthly IT invoice to go away. I'm scheduling a meeting with you for next Tuesday, and I want you to explain to me how you are going to make that happen. See you then." Click.

Even in good economic times, this call would not be surprising. But in times of economic uncertainty, this kind of call and business customer expectation should be anticipated and planned for. In fact, this call gets to the heart of one of the most critical "Key Success Factors" for any support center, which is a Call Reduction Strategy. All support operations, regardless of size, need to create and implement a detailed support strategy that includes reducing, deflecting, and, wherever possible, eliminating call volume. A Call Reduction Strategy must be just that - a strategy, a discipline, a continual process.
Why Reduce Call Volume?

The most obvious benefit of reducing call volume is that if call volumes are lowered consistently over the long term, you don't need as many staff to answer the phones/emails, which can translate to reduced expenses for salaries, benefits, training, rent, etc. But there are many more benefits to this kind of strategy:

- Reducing calls will increase the productivity of each individual customer by reducing time lost to problems and problem resolution.
- Reducing calls will increase customer satisfaction.
- Reducing calls will improve financial and operational performance metrics throughout your company, providing benefits to your customers as well as your support center.
- Overall support costs will go down.
- Support staff can be positioned to handle more strategic, value-added and business-critical types of issues.
- The image of the support center will be transformed from that of a utility function to a strategic business partner enabling the rest of the business to do business better!

Devil’s Advocate

The devil’s advocate may ask, “But if I reduce our call volume, isn't that going to increase my cost per call? Isn’t that going to upset my customers even more?” That would be true if we assumed no increase in aggregate call volume, or no corresponding changes in the support structure. The key is to focus on each high volume call category in a targeted fashion. The reductions must be measurable, they must be linked to an initiative, and they must entail corresponding communications with both the customers and the support staff. The intention is not to stop the customers from calling when they have a problem, but rather to prevent the problems that require the customers to call.

Where Do I Start?

The best place to start is with a good understanding of the services you provide. Work through this exercise:

1. List all the services you currently deliver.
2. Rank each service in order of importance/value to the customer.
3. Categorize services into problems vs. requests.
4. Identify services where you add no value, and look for ways to deflect or eliminate.
5. Estimate (ballpark) the cost to deliver each service.
6. Map your team’s skills to the services delivered. Where are the strengths? Weaknesses? Opportunities? Bandwidth to provide more value-add services?

The foundation for an effective Call Reduction Strategy is data. Every call must be documented and categorized correctly and consistently in order to produce meaningful reports that will help you target calls for reduction or elimination.
At a minimum, the following reports should be reviewed:

- **Top cases logged by customer** (Which part of the business is generating the most calls?)
- **Top cases logged by category** (Within each category, can you drill down to see what types of calls are coming in most frequently?)
- **Top cases by time spent** (Have you used the Pareto model -- call frequency X time spent -- to see what types of calls are most costly in terms of your staff's time?)
- **Top cases by value** (Have you calculated the dollar value of the most time-consuming calls -- call frequency X average length of call X resource cost per minute -- to see which cases have the greatest financial cost?)

### Root Cause Analysis

Once the top cases have been identified, it is critical to understand why they occurred and develop an understanding of what can be done to prevent recurrence. Work through each set of top cases using a Root Cause Analysis process:

- What trends exist in each category?
- What triggered these calls from the customers?
- Identify the ‘owners’ of the root of the problem or question.
- Conduct interviews with repeat offenders and “owners” of problems, questions and requests.
- Seek recommendations on what can be done to eliminate, reduce or deflect calls.
- Engage and get buy-in from the owners to work to eliminate or reduce the impact of the root cause.
- Use a debriefing process on global outages, such that the detailed chronology of events can be reviewed and opportunities for improvement identified.
- Formulate recommendations for solutions.
- Implement solutions.
- Communicate and market solutions, business impacts and results to all parties (i.e., IT community as well as customers).

### Best Practices

Help Desk and Support Center practitioners have accumulated quite a laundry list of best practices that can help eliminate or reduce calls. Because a Call Reduction Strategy is not a one-time project, but rather an ongoing strategy that requires attention multiple times a year (e.g., monthly or quarterly), it is helpful to review Best Practices periodically after producing "Top Cases" reports. What may not have made sense for your environment last year or six months ago may make all the sense in the world now. Priorities change, budgets change, and workloads fluctuate, so your perspective on the applicability of Best Practices in relation to your most recent Top Cases is likely to change. Here are some examples from the "STI 500 Best Practices" to help get you started:

- Develop a well-maintained, robust knowledge base with self-service and learning capability for your customers’ use. In the same sense that creating, maintaining and using knowledge can increase first contact resolution among your support technicians, knowledge can be used to help your customers solve their own problems, thereby reducing call volumes.
• Educate customers on the most frequently called in problems so that they can anticipate and be ready to solve those problems when they occur. For example, conduct a simple, basic training session for all new employees. This could include a handout or use of your on-line self-help tools for common email, internet, intranet, or dialup problems.

• Publish FAQs for all new hires and when new applications or significant changes are rolled out to refresh the customer community on solutions to commonly occurring problems.

• Reinforce the importance of your support center technicians using a training format to step the customer through "how to" requests while on the phone. This will help teach the customer what to do next time the problem occurs, and it will hopefully prevent a phone call to the Support Center. The corrective steps will be better retained if the customer does them rather than the technician.

• Communicate global outages and anticipated down times via front-end phone messages, portal/intranet announcements or other mass communications for customers. Once the customer is educated on the availability of these tools, they can develop the habit of checking them first when they experience problems.

• Web-enable as many routine functions as possible to eliminate or deflect calls, such as non-emergency case submittal, status checks and password resets.

• Continuously improve and reinforce use of automated and self-service solutions.

• Prevent problems from impacting productivity by using auto-correcting features.

• Review the Change Management Process for improvements.

• Always monitor progress, measure improvements and set new targets.

The Bottom Line

There are literally hundreds of tactics that can be used to reduce call volumes. What's important is not which tactic you employ at any point in time, but that you have a strategy. It must be a dynamic process that aligns with the priorities of the business organization, reflects the needs and character of your customers, flexes with the changing technical environment in which your customers do their daily work, and produces measurable results.