

# What Senior Management Needs to Know and Do About the Customer Experience



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# Introduction

**A**n Extraordinary Customer Experience is the measure customers use to determine with whom they will continue to do business. Whether or not your company evaluates that experience is irrelevant because your customers most definitely will. Delivering on the Customer Experience is a significant consideration in maximizing market penetration.

“Extraordinary” means that you leave the customer wanting MORE, developing a commitment to return, and telling friends, family, and colleagues about the experience. The Customer Experience is the bastion of loyalty; simple satisfaction is not. I can be satisfied with a concert and not return again. But when I am “moved,” when I “feel” the experience, I return again and again.

Customers have become more discretionary with their spending; they spend where and when it helps them feel better about some aspect of their lives. From pharmaceuticals to farm machinery and everything in between, companies are competing for a bigger share of their customers’ wallets. *The question that begs to be answered is simply, “What are you doing to improve your customers’ experiences?”*

I present to you a collection of my observations and musings. They are based on more than 20 years of observing actions taken and results produced by companies, executives, managers, staff, and leaders of all sorts. What they have in common is that they all impact the Customer Experience. I readily admit that this material is based largely on what, in my opinion and experience, works and what gets in the way.

During my career, I have had the privilege of collaborating with hundreds of organizations across a multitude of industries. One thing that I have absolutely learned is that it is not the business or the market that determines whether the Customer Experience is exceptional or excruciating. It is the organization, the people, the processes, and the technologies working together that make an Extraordinary Customer Experience. This collection focuses on the extraordinary!

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# Executive Vision — Sharing the Message

**E**xecutives are the authors and caretakers of their companies' visions. Each of us is the author and caretaker of our own vision; we are each our own "executive." It is an important moment when a company or individual formulates a compelling vision for the future.

*Vision is more than a statement; it is a force that drives the future.* When the force of vision is genuine, it is supported by values that literally drive behaviors. This builds momentum and moves the "vision adopters" closer to their goals. Vision requires *energy* to fuel the momentum. Rarely do we see great visions achieved by the worn out, the lazy, or the confused. Vision creates a driving and energizing force for the brand. The outcome is the power to influence, persuade, lead, and make things happen.

## SHARING THE VISION

Executive communication of the vision is a really interesting phenomenon. After spending a great deal of time, effort, and money on creating the vision, many executives spend a dismal amount of time, effort, and money on delivering that vision to the enterprise.

I have seen vision that never leaves the executive office — as if it had been created for the sole purpose of taking up valuable space in the annual report. I have seen vision distributed via a memo. I even saw a terribly embarrassing video done by a CEO with obvious good intentions, but extraordinarily poor results. The CEO filled what looked like a studio with employees wearing nametags. His presentation of the new and exciting vision was incredibly scripted, unnatural, passionless, and ... I need not say more. The worst aspect of the video was the audience. People looked bored beyond reason. Maybe the speech would have been better received if the CEO had taken his message to the various operational units, given the same speech a dozen or more times, videotaped himself in many areas of the company ... As presented, I cannot imagine there has been the least bit of adoption.

Creating a plan for communicating the vision throughout the company is critical to the realization of that vision. The mission of sharing the vision is *alignment* and *adoption*. The vision must be clarified to the operational level for alignment, and be exciting and explicit for adoption. Vision is only realized when the people and processes are in sync with the executive plan.

It is critical to evaluate communication methodologies and assess which methods will contribute to creating a genuine "force" in the enterprise. This is the force that drives the future. It also makes the vision more fun, exciting, and consistently reinforced in both word and deed at every level. "Fun" does not mean stupid. There are many serious-minded executives that consider "fun" to be a frivolous and silly objective. On the contrary, testing your vision against creative and engaging communication plans affords the opportunity to assess the power of the "force" you are able to generate.

Even the most senior executives ought to be part of a vision communication program — visiting the various business units and engaging in two-way conversation. The frequency with which the vision is involved in day-to-day dialogue plays a significant role in people's familiarity with it, alignment to it, and adoption of it.

## WHAT IS YOUR STRATEGY?

When a vision is strong and communication plans are developed, they must be supported by the Strategic Plan. Wikipedia.com defines “strategy” as “a plan of action designed to achieve a particular goal.” It sounds simple enough, but is anything but simple.

I liken strategy to sheet music. Sheet music is essentially a plan of action involving many moving parts that together achieve a specific goal. The sheet music may be intricately detailed and identify each unique chord and tempo, but without the orchestra it is only a plan. The success of the orchestra is dependent on a multitude of factors: the talent of the musicians and the conductor, the condition of the instruments, the acoustics of the theatre, the amount of practice, the strength of marketing, etc. It is quite similar to the execution of any Strategic Plan for any business. Without the proper execution of the orchestra the symphony will fail. Such is the executive Strategic Plan; the best-laid plans are nothing without Operations. *If your business were an orchestra would you buy a ticket to the show?*

Many planning attempts start out strong but hit bumps along the way. In our orchestra example, if the string section isn't tuned, the horns aren't heard, or the conductor loses his place, the objective is put at risk. Such is the challenge of writing the strategic symphony for the delivery of an Extraordinary Customer Experience.

Vision must be transformed into reality via a Strategic Plan. Executives are pivotal in its development. To be effective, the plan must cast a net wider than the executive suite; otherwise there is serious risk of the vision becoming nothing more than an executive illusion. This happens more than one would care to acknowledge and accounts for much of the cynicism in the rank and file because there is little clarity of the vision. The result is a low rate of adoption throughout the enterprise and actions that may be inconsistent with business objectives.

As with vision, the creation of strategy is an executive activity. The success of the Strategic Plan rests in the thoroughness and realistic nature of the plan itself, as well as the plan's adoption at every level of the enterprise. Adoption is often an *emotional choice*. If strategies are set forth as dictates, are unclear, or are laden with fear factors that elicit a negative emotional reaction, a force will most certainly be generated. Unfortunately, it may be one of resentment or resistance. Both are quite difficult to overcome and counterproductive, even fatal, to the achievement of vision and strategy.

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# The Enterprise Labyrinth — Customers Want Out

In ancient Crete, King Minos asked Daedalus to build a complex labyrinth for imprisoning the monstrous half-man, half-bull Minotaur. The Minotaur was given periodic tributes of fair maidens as food. The great warrior Theseus' greatest achievement was to slay the Minotaur deep within the bowels of the labyrinth and, with the help of Ariadne's colored thread, find his way out.

"Labyrinthine" describes something winding, complicated, and intricate. One walks a labyrinth by stepping into the entrance and putting one foot in front of the other. After traveling through the entire length, through the paths and windings, the walker eventually comes to the center. After a time there, the walker returns along the same pathway out as he/she went in.

Like language, war, and art, labyrinths have always been a part of the human fabric of society. They have been engraved, imprinted, and branded on the pottery, coins, and fabrics of culture since the beginning of civilization.

Labyrinths are also embossed on the very fabric of today's modern world. The Internet is one form of the contemporary labyrinth. There is also the extraordinarily extensive and complex labyrinth of copper and fiber carrying the voices of telephone and data networks that continue to grow exponentially.

Every enterprise today has an institutionalized reflection of a labyrinth embedded within it. It is often referred to as the Customer Service maze. Too often, we design technology to create speed; instead, we enable frustration and aggravation. Labyrinthine — this is exactly how some companies treat their customers, with twists, turns, swerves, options, choices, and inevitably confusion. *Isn't making customers jump through these assistance hoops and weave through the maze of service options just another way of giving them bad service?*

Customers today inevitably feel lost in a maze of "end" options — some are dead-ends, and others move them along but do not deliver them to the correct destination. *The same frustration felt by the ancients is being set upon our very modern day service environments, and your customers want out!* The surprise for many is that this is a surprise.

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When we attempt to utilize all the digital age's tools with archaic management philosophies that focus on production quotas, operational silos, and command and control models, we risk losing our customers within the very application and technical advances we introduce. The irony is that the Customer Service chain craftsman of the 21st century may still be using a 20th century tool.

### MAZE OR CLEAR PATH AHEAD?

There are many islands in the Customer Service chain, and any one can be left stranded, high and dry, with no way out of the labyrinth. If we are to enhance the Customer Experience, we must look at the Customer Service chain within the enterprise. *Is it a maze or a clear path?* To play in the future arena, we must call all our current practices into question. *Does what we do enhance or entrap our customers? Are we in fact inviting our customers into a labyrinth of options, none of which enables satisfaction?*

We must be willing to examine closely the path our customers follow and search for obstacles. In order to remove them, we may face a frightening condition. The obstacles may be due to management practices, not cube-level performance issues.

What most companies do today for their customers is complex. We have done a pretty good job of automating the simple, routine, and mundane transactions. Customers are increasingly compliant with using our tools, as long as we prove them easy and reliable. Handling complex issues, however, can cause enterprise confusion. Senior management often becomes confused because it has neglected to see that as routines become more complex, and as product launches and special campaigns become more frequent, the complexities of customer access increase. The agent who handles today's contacts needs to work "smarter." This often translates to "more expensive."

Technical support must be robust to sustain all the data feeds and transports required for meeting the ever-increasing appetite our customers have for access and accuracy. And, as if that were not enough, the customer is now complex too. This generation of customers demands better service, faster connections, better information, and better relationships. Customers are increasingly demanding more and better — and they want it now.

The flow of information between customer and company too often follows an erratic, random, inefficient, or wrong path. In complex business environments, massive amounts of data are transported in seconds. It makes sense that the enterprise ought to be able to figure out how to take some of the cuts, corners, and curves out of this inter-enterprise puzzle. It should be a straight shot to direct the agent to the information and offer the solution to the customer. This creates complete *relationship satisfaction* in every engagement.

We also must study the typical flow of customer engagements today. *Are we just throwing customer handling over the wall from one department to another? Is this good enough today?* These walls will keep some parts of the company isolated and protected from ever having to talk to each other or to the customer.

We have a definitive responsibility to review the entire service chain experience — the labyrinth our enterprise may have become. Only then can we truly evaluate our ability to respond to the customer in the most meaningful way possible.

# Building Customer Loyalty Through Brand Energy Power

A survey published in a June 2009 *USA Today* issue indicated that 45 percent of customers identify Customer Service as the biggest influence on remaining loyal to a company. Clearly, customers will stop doing business with companies due to the quality of the experience. In the same survey, only two percent of customers rely on brand name and reputation to remain loyal. Yet companies seem to pour more budget dollars into *traditional* brand management than into “branding” and subsequently “optimizing” the Customer Experience.

Optimizing the Customer Experience means fortifying the brand “internally,” from operational excellence to leadership and individual performance across all functional areas. Within the Contact Center environment, the Customer Experience is so visible and critical that it warrants a complete analysis within its own *Customer Experience Optimization* program. This is not yesterday’s “process analysis” — rather it begins at the top and translates the strategy and drivers that emerge from the executive office to every level of the enterprise. Only then can initiatives be truly transformational and assure aligned execution that yields a Customer Experience and a market advantage that price, product, and traditional “brand” cannot touch.

Imagine if every proposed initiative included an exercise on evaluating the Customer Experience. *How will what we want to do improve our customer’s experience? How will it generate revenue or cut costs? How well aligned is it with our value proposition? How does it deepen the brand in the market and in the company?* These kinds of exercises force discussion and unearth obstacles. Leaders at all levels have a responsibility to place themselves in the starring role of “Brand Energy Enabler.” They must understand strategy, communicate the vision, and adopt business drivers to ongoing and proposed initiatives.

Creating internal Brand Energy is an integral part of Customer Experience Optimization and a key component is having all players excited by the same “playbook.” That means working together to provide an experience driven by pride and caring, and supported by cross-functional operations. There is amazing Brand Energy generated within companies that define internal behaviors and structures around optimizing the Customer Experience.

Today’s markets are transforming at a pace we could not have imagined even 10 years ago. But there is one truth that remains in spite of all the technology advances and millions of management books written. Customers are people. People like to feel good, be appreciated, and simply be taken care of in a timely fashion using a channel of their preference. Embracing that fact at every level of the organization fuels the Brand Energy needed to optimize, work together, correct problems, fix systems, and improve processes.

Brand Energy Power will be generated when communication from the top is clear, budgets are allocated around improving the Customer Experience, and optimization at the operational level is cross-functionally inspired. Take action every day to evaluate and deepen Brand Energy and Customer Experience Optimization in your operation. The ROI — *Return on Information* — will be critical to long-term growth and success.

## Brand and Culture — A Powerful Union

**B**rand is about “meaning not marketing,” says Tom Peters.<sup>1</sup> *What does brand mean in your company? Is it about quality products, speedy delivery, or accurate orders? Or does it mean slogans, spin, packaging, and advertising?* Brand may mean any or all of these things. These elements of brand represent the external view of a company. When brand begins to involve the customer, the brand deepens. But when it begins to involve all elements of the enterprise — from employees to processes, procedures, collaboration, and even the environment — then it is *culture*. Many organizations have abandoned the term.

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I have had some recent experiences that remind me that culture is a player in fueling that internal furnace of Brand Energy. I had a conversation with a retired executive from a major corporation. We were discussing the evolution of brand as an element of employee experience, cross-functional collaboration, leadership, and overall enthusiasm for the job and the company. He paused and with a sort of nostalgic sigh said, “Yup, we used to call that culture.” And so it was.

*How strong can the brand be in the market without aligning it to your culture?* I believe that the brand weakens — even though the product may be strong — if the customer’s interactions with the company are with people that are dissatisfied, poorly managed, minimally trained, underappreciated, and apt to leave the organization. The experience will not match the brand. You risk “customer defection” — loss of market share and lower revenue. Nice move.

In the lust to cut costs, we see leaders focusing on a culture of budget. These people are not real leaders; they are what one woman called “evil financial overlords.” This leads to what borders on employee and customer neglect and abuse in some organizations. I once received a call from a woman asking what opportunities I might know of for an experienced Contact Center manager; her company was taking actions that were damaging to the employees, the customers, and the brand. The woman’s explanation was that the executives and the board had not left their offices in six months. They had no clue that their isolated, budget-only decisions impacted both their people and their customers. This woman’s personal brand was at risk, and she was looking to take her talent elsewhere. The risk here is defection of talent that leads to loss of experience, higher costs to replace and develop staff, potential poaching of talent by the departed, and discomfort for those left behind. Another nice move.

<sup>1</sup> [tompeters.com](http://tompeters.com)

Zappos.com has a fantastic merging of brand and culture. It is a “service company that sells shoes.” I heard Alfred Lin, Zappos COO, speak at the 2008 NCOF conference, and I was blown away. I knew that I had to experience buying something from Zappos. And really, what woman doesn’t need another pair of shoes? So onto the website I went and found a truly cool pair of Mephisto sandals, ordered quickly, and received free shipping. Shipping (both ways) at Zappos.com is always free, and you can return the purchase for any reason within a generous 365-day window. The site promised a three to four day delivery. Imagine my surprise when the shoes were delivered the next day. I was delighted, and the shoes are genuinely cool.

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**You can close the gap between brand and culture by offering richer experiences for your customers and for your people — the challenge is change.**

At the conference, each of the 1,000+ attendees received the 2007 edition of the *Zappos Culture Book*.<sup>2</sup> In the book, the CEO describes the culture of Zappos.com quite simply: “We want to WOW everyone we come in contact with — not just customers, co-workers, partners, suppliers — but everyone.” The book is a collection of testimonials by staff from all departments (Legal, Finance, HR, Contact Center, Warehouse, Executives, Everyone!) writing about the culture at Zappos.com. These folks are happy to go to work every day.

Conversely, I have met company leaders that are afraid to conduct Employee Satisfaction surveys because if they know how dissatisfied the staff really is, they may actually have to do something about it! Ignorance is bliss I guess.

You can close the gap between brand and culture by offering richer experiences for your customers and for your people — even for the CFO and all other executives that are on the hook for financial performance. The challenge is *change*; cultures are there by design or default. To alter a default culture may seem overwhelming, so just start small. You can begin by simply borrowing one value from Zappos.com — *kindness*. Imagine, this billion-dollar company embracing kindness as a core value. *Does that cost too much?*

So take time to explore the relationship between your brand and your culture. Then try building a culture around that!

<sup>2</sup> *Zappos Culture Book*, 2009 Edition can be purchased on [zappos.com](http://zappos.com)

## Fueling the Customer Experience — Vision Clarity and Brand Energy Power

**B**rand Energy Power is the internal furnace that fuels the Customer Experience. It means fortifying the brand internally with operational excellence, leadership, and individual performance across all functional areas. Brand Energy Power is the result of deliberate actions by company leaders to apply vision, strategy, business drivers, and budget to operational execution throughout the enterprise. This builds powerful and positive Brand Energy that drives innovation, efficiency, and passion.

Vision Clarity is the ability to apply vision to operations and to actually *achieve* something. Vision Clarity is what NASA needed when President Kennedy promised to land men on the moon and return them safely to Earth during the 1960s. The president had the vision; NASA had the nuts and bolts required to “operationalize” the vision. Much of the innovation, enthusiasm, and passion that NASA invested in the successful project was based on the original vision set forth by the president.

Vision is the *north* on our business compass. Without clarity of vision we move blindly toward our destination. Business leaders must embrace some Vision Clarity, a deliberate effort to *operationalize* the vision itself. They must identify specifically those behaviors that contribute to the strategic initiatives of the organization. For instance, Contact Centers can organize cross-sell and up-sell initiatives around contributing to top line growth and align all efficiency improvement efforts around contributing to bottom line goals. The Contact Center is involved in shaping and intellectually aligning with the vision.

*What is your company vision? Is it powerful enough to drive a consistent set of behaviors?* As an example, suppose your vision is “Provide a great experience for our customers and our people.” It becomes everyone’s job in each operational/functional area to develop Vision Clarity, that is, operational alignment to the vision. This is the ability to first define your business unit’s specific role in achieving this vision and then to define exactly what actions, communications, behaviors, policies, and processes must be in place to make a maximum contribution to the vision. Only then can Brand Energy be built into the enterprise.

Your initiatives might include defining competency requirements for individual contributors to assure that the right people are recruited and hired. (This is the ultimate defense against turnover.) The right people adopt the vision and contribute. The wrong people (even with the right competencies) have the wrong attitude and damage your environment’s energy with pessimism instead of passion. Training initiatives and quality programs must be deliberately aligned to the vision (i.e., Vision Clarity) to drive the specific behaviors that best support positive contribution to the Customer Experience.

Certainly, Vision Clarity requires effective process analysis — particularly of those cross-functional processes that require collaboration. Vision Clarity, once achieved, helps to break down the organizational silos that lack of alignment shores up.

*All in all, how are you doing in fueling the Customer Experience furnace? Are your people fired up about your brand, products, services, and about delivering the best possible Customer Experience?* If so, CONGRATULATIONS! If not, it is time to work on integrating Vision Clarity into your business unit and deliberately generating Brand Energy to drive a set of behaviors that supports your unit’s contribution to the enterprise vision.

# The Customer Experience — The Bottom Line on Financial Objectives

**T**he Customer Experience cannot be provided at a loss if profitability or sustainability is important to your organization. Customer Experience is at the heart of most of today's executive strategies. It is execution that matters in achieving executive strategies, for which the Customer Experience has become central. Strategic plans come with all sorts of objectives, and financial objectives occupy center stage. Needless to say, this is an area to proceed with caution. *Fortune Magazine* reported a study indicating that less than 10 percent of effective strategies are effectively executed.

Both financial objectives and strategic goals must be aligned, communicated, and adopted at each and every level. This seems like a “no brainer.” However, there are too many customer-interfacing parts of operations that do not understand financial goals and their particular role in achieving that goal.

*What to do?* Communication is really at the heart of the matter and at the core of successful execution. Leaders at all levels are responsible for translating the financial language of the executive suite into tactical, operational elements for each department. This remains something of an art form. I never cease to be amazed at public relations budgets dedicated to communicating to the outside world, with little or no budget allocated to communication within the enterprise. Sometimes, there is a level of over-confidence that the dissemination of information is done effectively. *This spells risk.* Remember the old telephone game. By the time the phrase is whispered to the last person, it is barely recognizable from how it began. This type of communication deterioration is common, especially when a communications plan is weak or poorly crafted.

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A communications plan requires some kind of feedback in order to acknowledge understanding and subsequent adoption of any initiative. When it comes to communicating financial objectives, it may be a worthy exercise to ask leaders to document *their understanding* of how their business unit contributes and how they will report on contributions. Leaders down the line are able to use the same methodology. Ask for input. Generally speaking, the masses are much smarter than given credit for. They just need the opportunity.

When looking at financial objectives, the communication mission is to “keep it simple.” For example, provide definitions for terms like *Top Line* and *Bottom Line*. I found these definitions at [www.investopedia.com](http://www.investopedia.com).

“Bottom Line describes how efficient a company is with its spending and operating costs and how effectively it has been controlling total costs. Top Line, on the other hand, only indicates how effective a company is at generating sales and does not take into consideration operating efficiencies which could have a dramatic impact on the bottom line.”

Providing objectives and definitions enables most individuals and departments to know that what they do impacts both additional sales and additional costs. It also illustrates the impact of operational efficiency gains to the company’s overall financial health. The Contact Center is a department with substantial customer contact — one where efficiency gains, selling skills, and impact on customer retention make a major contribution to overall financial achievement.

When we look at *Top Line growth*, the Contact Center may contribute via add-on sales or referrals to other parts of the company for products and services. Some Contact Centers are the “closers” for money invested in advertising campaigns and/or special promotions. If the Contact Center views itself as “order taker” only, failures occur. If Marketing neglects to communicate properly with the Contact Center regarding its campaigns, failures occur. If systems or processes introduce obstacles, failures occur.

Failures cost money and compromise the Customer Experience. It is critical to identify Top Line activities that the business units are responsible for; let them tell you how they can positively impact these areas. Then take it a step further. Ask them what gets in the way. But brace yourself! It could be bureaucratic — silos, politics, fiefdoms, etc. Only the senior level has the ability to smooth out the obstacles in this type of operational maze.

*What about Bottom Line?* Contact Centers are generally ripe for efficiency improvements. The key is to take the time to identify areas with genuine, long-term returns. Ask the Contact Center front line to reply anonymously to this question: “*What are the dumbest things we do here? How can we improve?*” You may well find seeds of inefficiency in the answers.

Taking action; providing necessary training; clarifying objectives; analyzing frequent, complex, and critical tasks; improving processes and technology; and defining specific desirable behaviors for all contributors build momentum for efficiency gains, help improve sales, and enable smoother processes and better use of technology. These all contribute to the Top Line and the Bottom Line, as well as to the Customer Experience.

Get to work on connecting the Customer Experience to growth and profitability. In the long-term, this is what works!

# The Customer Experience — The Power of Specificity

**“Today’s marketplace is rapidly changing from product-centric to customer-centric, and customers demand a higher level of service, satisfaction, and personal communication.”**

*John Chappellear, The Daily Six*

**W**e must remain vigilant when it comes to maintaining a competitive edge. Customer Service Operations that can demonstrate value and make a definitive contribution to the Customer Experience will help your business remain “recession-proof.” It will remain unique and not become a commodity.

According to Wikipedia, “Commodization” is when products and services “move from unique and branded into a market based on undifferentiated price competition.” Take the case of law firms that now respond to RFPs for legal services. The law firm world is working its way through the grieving process — disbelief, anger, and denial. Who knows if it will reach acceptance — something never thought possible by members of this elite profession. They are becoming just another commodity.

Consider a time when metals, produce, and oil were our best-known commodities. Today, credit cards, air travel, financial services firms, retail, and even some luxury brands are facing *commodization through counterfeiting*. Louis Vuitton took a strong stand against counterfeiting by adopting a zero tolerance policy. In 2004, the company’s stance led to over 13,000 legal actions, 6,000 raids, and 947 arrests.<sup>3</sup> Tiffany sued eBay over trademark infringement for allowing counterfeit Tiffany jewelry to be sold through its site.<sup>4</sup> Both companies fought off commodization while simultaneously attempting to appeal to a wider audience.

*What have you done to define and protect your customer’s experience?* Think about the key areas below and assess your performance.

**Customer Service Operations that can demonstrate value and make a definitive contribution to the Customer Experience will help your business remain “recession-proof.”**

- **Hiring** — Hiring the absolute right people for the job is a good starting point. I recently was exposed to a company that hired overqualified staff for their positions by misusing the brand to attract candidates. The misuse came in the form of HR implying greater opportunities for advancement than really existed and misrepresenting the Contact Center job. Acts like these do not enhance retention. They enhance turnover and damage your reputation as an employer. The proper competencies must be defined; recruiting must align to the accuracy of the position.

<sup>3</sup> louisvuitton.com

<sup>4</sup> USATODAY.com, June 22, 2004

**Companies everywhere are looking for ways to manage costs, improve quality, and generate revenue. The Customer Experience is a contributing factor in consumer decision-making. So fight off the commodization of your brand, and prepare to differentiate the experience.**

- **Training** — Training your staff to deal with ever-changing demands of the job is also critical. It is very frustrating for a customer to be handled by someone that clearly does not have a grasp of the information and cannot instill confidence. No matter how well your training teaches agents how to “communicate,” the Customer Experience will be at risk if agents lack the required knowledge. Some of this can be automated with eLearning tools that assign training automatically and on demand based on performance results. Many companies even use learning “clips” created from recordings or other materials.
- **Measurements** — Measures are the feedback mechanism we use to assess performance at every level. According to Kaplan and Norton, “Companies should decide what processes and competencies they must excel at and specify measures for each.”<sup>5</sup> *How well do your measurements align with effective processes and competencies?* The Contact Center world often falls victim to the lowest common denominator via measures that have absolutely nothing to do with the Customer Experience — calls per hour, target talk times, after-call work, and idle times. We even expect grown-up professionals to code each trip to the rest room! I’m not saying these are bad measures. But when taken in isolation, they may inspire behaviors quite contrary to providing an excellent Customer Experience — like rushing off from a call or hanging up on a caller to improve a score. Individual measurements must balance quality and quantity to positively contribute to the Customer Experience. Customer feedback surveys delivered over IVR, the Web, or email can bring the customer perspective into your decision-making.
- **Leadership** — Leadership is the core differentiator in organizations that truly deliver on promises and add value to the enterprise. Strong leaders can fight a good budget battle. They can create an environment where intrinsic motivation fires are sustained through effective development, job enrichment, rewards and recognition, and excellent communication around vision and purpose. Leadership truly means the ability to serve, and we all have leadership responsibilities. This is an excellent time to hone those skills; they are a desirable asset to yourself and your organization.

Companies everywhere are looking for ways to manage costs, improve quality, and generate revenue. The Customer Experience is a contributing factor in consumer decision-making. So fight off the commodization of your brand, and prepare to differentiate the experience. Be deliberate and ask for contributions from the staff closest to the customer ... starting today!

<sup>5</sup> Kaplan, Robert S., Norton, David P., *Strategy Maps: Converting Intangible Assets Into Tangible Outcomes*, HBS Press, 2004

## Processes and Technology — Challenge Yourself

In order to win and sustain the loyalty of our customers, we must be willing to *challenge everything we do and have done*. Most importantly, we must challenge ourselves as people and as leaders.

I recently called the Internet technical support arm of my medical insurance company. The young man in the Contact Center to whom I was connected did not listen, jumped to conclusions, was rude, and ultimately hung up on me. I admit that I can be a tough customer. But I also know when I am being unreasonable, and in this particular case, I was not. Needless to say, I called back and spoke to a supervisor who promised to speak to the manager. The next day, the manager called me back and explained that he had listened to the recording and agreed that the agent was way out of line. Great — we agreed. Then he said, “Chris has always been one of our best.” If that is your best, sir, you are in BIG trouble!

This is the type of situation to seriously consider. Do you *really* want to tell a customer that the person that hung up on you is one of your “best” agents? It’s time to challenge everything! In this case, the leader needs to challenge his beliefs about what constitutes “best.” He also needs to challenge his belief that a customer that was hung up on would want to hear that the person was one of the “best.” Challenge the agent to give you a few good reasons why he should not be fired. Challenge the standard that says hanging up on a customer is OK. It is not, under any circumstance. If an agent has lost control of the call, that call should be transferred or escalated, but never disconnected.

We simply must “challenge everything.” If your quality program is producing high scores, but the Contact Center is not producing great results, the program’s effectiveness must be challenged. Some quality programs are driven by leaders that simply want to know that the minimum number of observations was done and that scores were within targeted range. That way they can report on the same to their leaders and consider the matter closed. *Everyone delights in the denial. Push forward to delight in the challenge.*

When senior executives demand an increase in the number of contacts being handled by the IVR, challenge them to learn what “kinds” of transactions are being handled. *Which is more powerful — automation or elimination?* Challenge your ability to make a case to senior management; it is the biggest challenge mid-level managers face and the most rewarding to overcome.

Challenge your budget. Is the budget actually *damaging* the brand? When training, incentives, or additional investments in technology are denied, you may be reducing costs in the short-term. But you may also be increasing the cost of errors, turnover, and customer churn and (worst of all) risking “brand damage.” If your brand says you are smart, responsive, and able to run a quality operation, but your budget says you can scrape by on last century’s technologies, minimal training, and hiring based on price and availability, the brand will be *damaged*. You as a leader must challenge yourself to tackle this issue!

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**In order to win and sustain the loyalty of our customers, we must be willing to challenge everything we do and have done.**

There are many managers that actually delight in pleasing their leaders by not challenging budget decisions and issues. Complacency is the enemy: “They would NEVER fund that.” An IT leader once said “they” would never approve funds for the technology investment recommendations we made because after all, “they” wouldn’t even give him \$35,000 for a telecommunications system upgrade. Well, before the project was over, the company had invested several hundred thousand dollars to upgrade the technical infrastructure because a compelling case had been built that was worthy of the investment.

Challenge yourself to build a compelling case that supports the needs of the business. Budget magic occurs! I challenge you to create a “vision budget” — one that aligns with the vision and strategic goals of the enterprise — and present it accordingly. Challenge the executive office to help you make good on the vision and the brand via the budget.

And finally, challenge yourself to be the greatest leader you can be by maintaining a healthy level of optimism, building an energized environment, and communicating clearly. Lead your team away from stresses and strains and into the rewards that come from enjoying a genuine sense of contribution and being part of something.

Challenge yourself to look around at your world and study all the things there are for which to be grateful. We live in a time in which *time* is a commodity. It should not be wasted, but invested and meaningfully utilized without useless interruptions. Challenge yourself to steal some time back, to invest some time to do nothing, to breathe some fresh air or maybe watch the sunrise (or sunset). Most importantly, challenge yourself to study the wonders of your own world, to assess how much of this precious commodity we call *time* has been invested in those most dear to you.

*When we think of fun, happiness, or an attitude of gratitude as a choice, why would we choose anything else? Challenge yourself and everything around you. You’ll be grateful you did.*

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**“The challenge of leadership is to be strong, but not rude; be kind, but not weak; be bold, but not bully; be thoughtful, but not lazy; be humble, but not timid; be proud, but not arrogant; have humor, but without folly.”**

Jim Rohn, leading motivational speaker, philosopher, and entrepreneur

## Elimination — Infinitely More Powerful than Automation

**W**hether at home, school, or work, the ability to *eliminate excess* allows space for clarity, productivity, and a genuine feeling of well being.

Every business unit in every company today is faced with doing more with less (usually money), while simultaneously being asked to improve the Customer Experience, increase productivity, reduce errors, increase revenue, and reduce cost. We must carefully evaluate automation recommendations and ask ourselves, *Is this automation truly going to yield the greatest efficiency? When technology offloads contacts does it then add staff in IT to support it?* The objective should not be to move costs around (although for some, moving it off *their* budget is good enough).

Automation is all about *process*. The best means to arrive at the decision to automate is to *first do a process analysis* — then determine if there is technology to improve the process, offload it, or (more powerful than either of these) ELIMINATE it. The “best practice” of determining the WHAT before the HOW means that the analysis is done *prior* to arriving at a solution. Far too often objectives are established or technology is purchased with little or no prior process analysis. When few requirements are defined, the way is left open for the people you are buying from to define your needs rather than you defining them. This “abdication” often results in attempting to back your processes into a system that may cause more problems than it solves.

I once worked with a Contact Center where a senior VP charged the Center with increasing the percentage of calls handled in the IVR from 20 percent to 30 percent. The Contact Center team nodded in agreement. The first order of business — remove the zero-out option and the calls will *look as if* they were completed in the IVR. Bingo! Stats were up and the Center was on the way to hitting that 30 percent. Problem solved. If only the VP knew how this increase had been accomplished or that the most frequent call type was inquiry related due to billing errors. If only the team had been able to make the case for *fixing the billing system*, the majority of calls would have been eliminated. This would have accomplished what the VP was after. It would cost more and take longer, but the impact would last longer, and it would be a one-time expense. Elimination positively impacts resource requirements, cost, quality, and the Customer Experience.

Elimination is an outcome — not unlike cleaning the house, closet, or garage — where the objective is to get rid of things that are in the way (or no longer add value) or to re-organize for better access. We must be cautious when improving processes to assure that we are not just doing some “cleaning” only to soon refill the now available space with useless clutter.

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**Tools are important in evaluating processes for improvement or elimination. They range from something as simple as asking your front line, “What are the dumb things we do here?” to the more sophisticated application of technology — such as workforce optimization.**

Tools are important in evaluating processes for improvement or elimination. They range from something as simple as asking your front line, “*What are the dumb things we do here?*” to the more sophisticated application of technology — such as workforce optimization software (developed by Verint Systems and others), which provides applications for forecasting, scheduling, adherence, quality monitoring and recording, desktop and process analytics, customer interaction analytics, and customer feedback surveys, as well as performance management, automated eLearning, and coaching. A great example of this is a Canadian financial institution that used speech analytics technology to “mine” recordings for phrases that were repeated within calls. The company was able to dig into specific issues and move from anecdotal to actionable empirical data. The operation now reviews all mailings to customers to eliminate the cause of many phone calls that were generated by confusing language in mailings. This is only one of many improvements it was able to make to drive cost down and quality up. That is often the power and the outcome of elimination; there is a streamlining of the experience.

Too many steps in a process make it ripe for errors. Errors and rework waste time and cause customers to contact us — and not for the reasons we’d like them to. Streamlining a process translates to *fewer contacts* and to an *improved Customer Experience*. Yet it takes time and skill to know how to evaluate a process from end to end. It takes cross-functional support because like our Canadian example, the fix may lie outside of your area of responsibility. All those business units in the Customer Experience Continuum *must align* for elimination to occur.

Warehouses that receive poor order information from the web or the Contact Center will waste time, energy, resources, and money on picking and packing the wrong merchandise. Never mind the returns, the impact on inventory, and the customer’s needs not being met. Speed and accuracy are critical; all participants in the process must commit to working together to discover opportunities for elimination.

I once wrote an article about an organization that instituted a role called “Director of Causal Analysis.” Her job was to eliminate as many process issues as possible that drove customer complaints. Her team had responsibility for Quality, the Agent Assist queue, and all customer call data analysis. It met weekly to identify any customer that had called in repeatedly (within 30 days). The team pulled and listened to all recordings, checked records, identified the causes of calls, and determined the exact triggers of the contacts. In some cases, an agent needed more training, but in more cases it was a backlog or back-office bungle in another department that contributed to the problem. The team did not simply search for the guilty; it partnered with the department in question to resolve the process issue. This actually resulted in improvements within two business units, not just one.

The Director of Causal Analysis and her team did not wait until an issue arose to initiate a cross-functional dialogue; they identified those business units in the Customer Experience Continuum and proactively reached out to them. When issues arose, a relationship was already in place. They were not met with a defensive posture, and many problems were eliminated due to collaboration. This is a “Functional Cross Function.” In one case, the Contact Center sent several of its agents to be trained in order to help eliminate the backlog. Likewise, the back-office personnel were trained to handle calls in order to be available during peaks. Everyone benefited. The team enjoyed quite a good reputation. Unfortunately, the company was recently sold, and the new regime did not adopt this model. My guess is that it will likely have to resurrect it in a few years.

Look around your business unit and look into your life. *What is in need of attention?* Look and listen, take action, be kind, and have fun. Be the messenger of possibility.

# The Customer Experience — The Human Element

**H**ave you ever read *First Break All the Rules*<sup>6</sup> by Marcus Buckingham and Curt Coffman of the Gallup Corporation? If not, you may want to consider it. The overwhelming message of the book is how to be a more effective leader by taking a new and fresh look at what you are trying to accomplish and how you are doing it. Buried within is 25 years worth of Gallup research on what customers really want; more than one billion people were surveyed to identify what *really* matters to them about service. The findings are organized into four categories that are labeled as *Low-level Satisfiers* and *High-level Satisfiers*. The Low-level Satisfiers are *Accuracy* and *Availability*. Achieving these “only prevents dissatisfaction.” The High-level Satisfiers are *Partnership* and *Advice*. The authors state that achieving these are “not easy to do, but are difficult to steal” — as in replicate.

I would like to use the four categories under the Low Satisfier and High Satisfier labels to stimulate some thinking around *simplifying* the process of understanding and reacting to customer needs. They serve quite nicely as a foundation for assessing the operational side of the Customer Experience. Let’s use the Contact Center as our case example.

## LOW-LEVEL SATISFIERS

We need to recognize that there are no “points” earned for achieving Accuracy and Availability, the Low-level Satisfiers. But there are operational elements that assure their achievement.

### Accuracy

Customers expect information to be correct. *But has anyone called you lately to say thanks for getting it right?* It is not enough to simply acknowledge this obvious fact; we must identify the elements that the objective of Accuracy requires.

- **Competencies** — Competencies must be very clearly defined. If you don’t intend on teaching basic computer skills, TEST the candidates to make sure they have them. If your agents will be required to write emails or edit email suggested responses, TEST their writing ability. When the Customer Experience is of high importance, TEST their definition — *is it a match?* Certain competencies cannot be trained; it is more effective to *hire smart* than be stuck with someone not right for the position.
- **Training** — Agents must be well trained and depending on the complexity of the business, also skilled in the area of critical thinking and problem solving to enhance consistency across the operation. Training is an ongoing process, not just a new-hire requirement.
- **Communication** — An effective communication approach must be in place to “move” relevant information to agents in a timely fashion. Centers vary in their approach — from updates to paper manuals, memos, emails, Intranet, large plasma screens, “ribbons” on the desktop, whiteboards, etc. We have seen many cases in which supervisors become overwhelmed by information pouring in from too many places; anyone with a distribution list seems able to send changes or requests to the floor. This is frustrating and challenges Accuracy at its very core.

<sup>6</sup> Buckingham, Marcus, Coffman, Curt, *First Break All the Rules: What the World’s Greatest Managers Do Differently*, Simon and Schuster, 1999

It is critical to establish a “Communication Liaison” function to serve as gatekeeper and to take a long and hard look at the means by which you communicate to the front line. If you have resorted to the dreaded brightly colored paper on agents’ chairs, it may be time for serious reengineering.

Think about it. *What else contributes to Accuracy in your Contact Center?*

### Availability

Availability is another Low-level Satisfier that must be met before any Customer Experience points are earned. Availability includes these elements.

- **Hours of Operation** — Many companies have had to evaluate whether their hours of operation are an asset or a liability in their market. We worked recently with credit unions that made what, at first, was a painful decision to move to extended hours. Tough as it was, the decision was made before the banking “meltdown,” and it fared quite well. It can now compete with the big guys in terms of hours of operation, while being more stable in terms of the meltdown.
- **Customer Access Channels** — Recently, I went to the eye doctor and was given a new prescription for my contacts. Since I order my contacts online, I asked the receptionist if they could provide me a copy of the prescription electronically. She told me that she “didn’t know anything about THAT” and not in a very nice way. This is one of the issues with customer access. Customers want to do business with you on *their* terms and on *their* schedule; if your business is behind in the area of electronic access, you could also be behind on market share.

### HIGH-LEVEL SATISFIERS

*Partnership and Advice* is where the Customer Experience becomes a market differentiator. Let’s assume that you have competitors — a relatively safe assumption. Most markets today will look to match or beat their competitors on price, services available, promises, etc. But the real differentiator may just be in the Customer Experience. *How easy is it to reach you? How easy is it to understand the user manual? How easy is it to use or access your warranty? How easy is it to get helpful answers?* Study your call types. Some of these answers will emerge, and you will know that it is time to act.

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**When discussing with or training staff on the Customer Experience, it is critical for them to understand that building the *relationship* is, in fact, establishing the Partnership.**

### Partnership

When discussing with or training staff on the Customer Experience, it is critical for them to understand that building the *relationship* is, in fact, establishing the Partnership. Relationships are built in many ways, and the front line has a lot to do with it. A relationship is being able to recognize the customer’s need, not only in specific terms, but on an “emotional” level. Providing a WOW or a THRILL leads to establishing an emotional connection. For example, when I go to Amazon.com, I like the fact that MY page shows up, MY recommendations, and MY account history. Amazon.com has made it easy for me to do business with them, at least in part because the company has managed to establish a relationship based on my unique needs. When you have customers on the phone, building a Partnership with them is about needs and nuances. It is about being able to *fully represent* your brand and deepen the relationship.

If you are in a position to give true Advice — the kind that will possibly increase sales or order size — it's important to know that very few consumers will accept it without a Partnership already in place. This is illustrated when an unhappy or frustrated customer is escalated to a supervisor; the supervisor may be more sensitive to the customer's frustration, de-escalate the situation, and give the exact same answer as the agent. Yet, the answer from the person that built the Partnership (the supervisor) is accepted, while the non-Partnership Advice is rejected. Ask yourself if your front line has in place the tools necessary to build that Partnership, for example, through clear customer records, clear notes, profiles, etc. *Do they have authority to take action and resolve issues in a single contact?* Check out the front line's capabilities in these areas; identify weaknesses and move to correct.

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**We need to view our customers as invited guests to a party, with us as the hosts. It is our job every day to make every important aspect of the Customer Experience count.**

#### Advice

Advice is the *ultimate factor* in the Customer Experience. Advice about products, services, and more is often in the hands of the front-line contact. Advice takes the Accuracy and the Partnership elements and translates them to a market differentiator because they yield an emotional connection. People like to take Advice from those they have *confidence* in. We all have hung up from a call and called back not only because we may not have “liked” the answer, but because we felt it could be “wrong.”

When you consider that it is the Advice function that solves problems and makes additional sales, the concept is easy to embrace. Add-on sales offers are the *ultimate* in Advice; the front line advises the customer on other products or services that are available and appropriate. I sat in a bank one day and watched an agent kiss a \$20,000 CD goodbye because he didn't offer anything else to the customer. Although the bank had a multitude of programs potentially suitable for the customer, the agent was more comfortable explaining how to cash out the CD.

Advice is about confidence, critical thinking, brand knowledge, and (of course) products and services. No matter how *smart* we may be, smartness only has value to those with whom we have built a relationship and, in fact, a Partnership.

There are challenges to achieving the High-level Satisfiers, and they often lie in the Low-levels. If you cannot achieve Accuracy and Availability, you may never get the opportunity to get to the Partnership and Advice level, no matter how good you are at it. Customers will become frustrated before you ever get to that height. All of these elements *must work together*, but somehow in order. We need to view our customers as invited guests to a party, with us as the hosts. It is our job every day to make every important aspect of the Customer Experience count.

# Training and Coaching — Partnership for Performance

**T**oday's Contact Centers demand new, innovative, and integrated approaches to training, coaching, and learning. The Contact Center is one of the most customer-interfacing business units within the enterprise. This is where customers *will truly experience* the brand and where information is rich regarding customer needs and preferences. This visibility has added responsibility to the Contact Center for customer retention, on boarding, recognizing and responding to sales opportunities, and cross-functional process improvements. It is also vital for developing a scalable and nimble environment that is able to change, as needed, to meet the objectives of the organization as a whole.

The front line has become intimately connected to the bottom line. Consequently, the initial and ongoing development of staff resources becomes critical to the success of the operation and the quality of the Customer Experience. The importance of targeted and learner-focused training programs — both initial and ongoing — has risen to greater heights due to the increased focus on front-line performance.

## PERFORMANCE-BASED LEARNING

With today's complex business environments, many organizations have adopted a *performance-based learning* approach. This approach essentially integrates all required job tasks and knowledge/skills and presents them in the same way that the agent will experience them. The traditional training model typically is more linear: first teach the systems, then the products, and finally the customer service skills. With a linear model, the training does not reflect the way the agent will experience the task and apply the knowledge.

In a performance-based model, training is viewed as an event that does not teach everything. Instead, it is lean and relevant — focusing on the most frequent and critical tasks, as well as the support tools required for doing the job. The approach is learner-focused, not trainer-focused.

## A WINNING COMBINATION — TRANSACTION AND INTERACTION

Effective training combines and integrates the *transaction* and the *interaction*: The transaction focuses on “the job you do,” while the interaction focuses on “how or why you do it.” Here are some examples:

- **Transaction-driven elements** — preparing for the first day of calls, understanding products, entering a new order, inquiring about an order, changing an address, handling a return, using a website, etc.
- **Interaction-driven elements** — feeling excitement and energy for the brand, focusing on agent impact on the Customer Experience, critical thinking and problem solving, rapport and empathy, brand penetration and add-on sales, gains in confidence and enthusiasm, feelings of empowerment, etc.

The ultimate goal of any training program is always to *create an unforgettable learning experience* for your new or existing agents — one that delivers effective, enthusiastic, knowledgeable, and empowered agents. Unless this is accomplished, the Customer Experience will be greatly diminished.

## UNITED WE STAND

The ongoing evaluation of training — long after the classroom piece is finished — is a requirement, not an option. Many organizations “blame training” when turnover occurs or when agents perform below par. To avoid this conundrum, it is important to position training as *one element* within a larger performance program and not the sole element of an isolated event. In this way, each element can be assessed at varied intervals throughout the year. Training, Quality, Operations, Human Resources, etc., all need to work together seamlessly. This is accomplished only via careful and collaborative planning among multi-disciplinary areas.

## EFFECTIVE COACHING PROGRAMS

Coaching in the Contact Center is an important part of ongoing training. Coaching is most frequently identified with giving feedback on calls that have been observed as part of a Call Quality program. Far too often these programs focus primarily on the interaction with little focus paid to the elements of the transaction or the behaviors necessary to meet the objectives of the Center as a whole.

Although many elements are captured in the Call Quality program, it is best to reinforce skills in a multitude of ways. For example, if a coach observes behaviors that do not support the brand, they must act immediately and not wait until a scheduled “coaching” session. It is important to look beyond the Call Quality program and identify additional opportunities for providing rich and meaningful coaching experiences.

Effective coaching can focus on a variety of topics and conditions that surface from several sources: a Call Quality program, a training class, on-the-floor observations, and the like. Coaching opportunities are abundant and result in major gains within the Contact Center. An important point about coaching is that feedback must be positioned around the positive and not around “gotcha.” The thrust should be on continued improvement and enhanced performance. As an example, “catching agents doing something RIGHT” models effective performance and reinforces the positive spirit.

Some of the process can even be automated, helping organizations enhance the Customer Experience by initiating, delivering, and following up on personalized eLearning and coaching sessions between employees and supervisors. The software supports staff development, ongoing training, and agent career-pathing. By tying coaching together with scorecards, key performance indicators (KPIs), quality evaluations, training, and other benchmark metrics, such solutions introduce a more formalized one-on-one learning process that helps employees develop and enhance the skills they need to be successful.

Executives and senior managers must take a hard look at how training is developed and delivered, as well as the effectiveness of both new-hire and ongoing training initiatives. Real budget dollars must be allocated to the entire subject of training and coaching to assure that the right resources are assigned and are skilled in training design and development, performance assessment, and/or providing feedback. An investment in training must be made — one that includes a commitment to its ongoing and consistent evaluation. Only then will training, performance, and coaching achieve their full potential.

## Transforming Data to Action

There was a time when the Call Center was considered a backroom operation, a *cost center* that dealt with Customer Service issues. Today's Contact Center is now the focus of many enterprise initiatives. Its cost, the volume of contacts, the potential for revenue, the importance of customer relationships, the Customer Experience, and the changing marketplace have all played a role in altering how the enterprise views it. Management must be prepared to respond to these changes and build value-based relationships with others across the enterprise.

The Contact Center is not a stand-alone unit. Every organization has a Customer Contact Continuum. Whether acknowledged or not, it exists. The Contact Center is really part of that continuum, impacted by many activities that reach well beyond it.

Consider this assignment. Conduct a brown bag session — assemble managers, supervisors, and staff. Wrap the room in paper, get your markers out, and start asking questions. *Where do our contacts come from? What is the cause of the contact? Where does the work we do go from here? How do we impact others? What revenue generating opportunities and cost considerations exist in our relationships?*

This exercise will yield a visual of the Customer Contact Continuum. Once the visual is created, take a step back and assess your current relationships and your visibility. *How do others within the enterprise view the Center — as a valuable asset or as a factory-like operation? Do we get what we need? What would happen if our relationships improved? How would cost and revenue be impacted? What do we have to offer to others? How can we help ourselves and others improve?*

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**It is important to work together across the Customer Contact Continuum and understand the benefit of forming strong relationships. The Contact Center possesses great knowledge regarding many aspects of the enterprise. Formalizing the sharing of this intelligence is the basis of the Contact Center's value proposition.**

Contact Centers must manage their visibility to influence their value. Today's Centers have “genuine currency” with which to barter for their visibility — information. *Information is currency in this digital age, and Contact Centers are a pure source of it.* The number of contact hours often amounts to years of exposure to customers annually. What you learn from this and how you mine for information has the potential to assist every part of the enterprise in improving performance. The Center must begin to view data collection as part of its *value proposition* to others. Data about the customer and about products, policies, and procedures must be as important a focus as service level and abandon rates. Let's face it. Contact Center-specific metrics are barely understood within the Center, let alone outside of it.

It is important to work together across the Customer Contact Continuum and understand the benefit of forming strong relationships. The Contact Center possesses great knowledge regarding many aspects of the enterprise. Formalizing the sharing of this intelligence is the basis of the Contact Center's value proposition. The more value you are perceived to possess, the more potent your visibility.

As an example, many Contact Center staff complain about how Marketing doesn't provide needed information. You've heard the stories and possibly have told them. There is an almost victim-like acceptance of these behaviors. But step back and think. *Is this really a Marketing department issue? Do they have real benefit in ruining us? Are they plotting the demise of the Contact Center this very minute?* I doubt it. The reality is that other departments don't even think about the Contact Center; it is not even on their radar screens. Marketing may simply see the Contact Center as a factory floor, a place where production takes place. And we fuel that view by proudly reporting pure production numbers.

A shift in relationship must be driven by a shift in *visibility*. Continuing the Marketing example — the Contact Center has daily customer contacts that when properly analyzed help to identify effective (and non-effective) offers, campaigns, or promotions. Compiling information to deliver to other departments around product performance, a service, a price, or a procedure helps drive all departments to improve performance within the enterprise. It also satisfies the *quid pro quo*. When you want to receive information, offering valuable information provides something valuable in return.

The change comes, in part, via the data we collect — what we find important and what will add value. Acknowledging the continuum is one step. Identifying specific contact information in a way that makes information sharing easy is another.

Not all Contact Centers are equipped with the right technology, such as workforce optimization software. But if you have people, you have experience. Begin using any means necessary to capture important *transaction type* information to build your value proposition. As an example, many Centers lack sophisticated CRM and CTI applications but have very good Call Recording/Monitoring systems. These systems can gather valuable information on customer responses to products and services. Believe me — shipping a couple of sound bytes to Marketing on the success or failure of an activity in your *customers' own words* is a true winner. While the sample size may be small, it is compelling evidence and a great way to demonstrate the *value* the Contact Center can bring to partners along the Customer Contact Continuum.

Think about how the Contact Center can add value to other departments — Operations, Manufacturing, Research and Development, Human Resources, Technology, Training, Finance, and Legal — any group identified within your continuum. It is likely there are improvement opportunities that can reduce cost, enhance the Customer Experience, improve revenue opportunities, and reduce exposure to possible legal issues. The list goes on and on, but the mining of information must be an activity of primary importance. It is the currency with which to barter for the Contact Center's visibility and its value. Deliberately managing Contact Center visibility is a critical success factor in gaining respect and budget for your Center and broader Customer Service Operations throughout the enterprise.

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**Information is currency in this digital age, and Contact Centers are a pure source of it. What you learn from this and how you mine for information has the potential to assist every part of the enterprise in improving performance.**

## About the Author



Kathleen M. Peterson is founder and Chief Vision Officer of PowerHouse Consulting ([www.powerhouse1.com](http://www.powerhouse1.com)). As a sought-after consultant, Kathleen's refreshing and sometimes challenging philosophies include her position that the call center is the true lifeline of the enterprise — where vision, brand, leadership, and execution combine to deliver a powerful customer experience.

As originator of Brand Energy Power™, Kathleen is an expert and consulting partner in the field of customer experience, where she works with many of the world's top customer-focused companies. A featured speaker at conferences and Fortune 500 companies, she has shared her humor, knowledge, and experience across four continents, including keynotes in the United States, London, Paris, Turkey, Dubai, and Hong Kong.

Kathleen is widely published in some of the most prestigious industry journals in the U.S. and abroad, and is an active member of the National Speakers Association and the Society of Telecommunications Consultants (STC). She also has served as a Certified Associate with the Incoming Calls Management Institute (ICMI) and conference chair for the North American Conference on Customer Service Management.

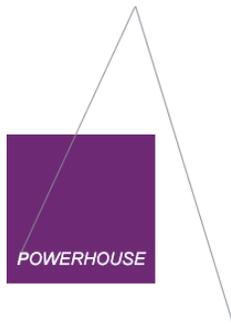
## About PowerHouse Consulting

PowerHouse Consulting, Inc. is a professional management and technology consulting firm that provides expertise in applied telecommunications (voice/data/image/integration) and customer service (contact/call center and help desk) applications. It is comprised of seasoned experts with the knowledge and experience to bring quick, practical, and cost-effective solutions to every engagement. With PowerHouse, clients are assured resources that are independent and dedicated to their unique business objectives. PowerHouse's goal is to consistently exceed client expectations by providing incomparable service and superior state-of-the-art technical expertise.

## About Verint Witness Actionable Solutions

Verint® Witness Actionable Solutions® is the leader in workforce optimization software and services. Its solutions are designed to help organizations capture customer intelligence, uncover business trends, discover the root cause of employee and customer behavior, and optimize the customer experience across contact center, branch, and back-office operations. [www.verint.com](http://www.verint.com)





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