

For Business Continuity,  
Don't Forget the

# Human Element



Don Peppers

Recognized for over a decade as one of the leading authorities on customer-focused business strategy, Don Peppers is an acclaimed author and a founding partner of Peppers & Rogers Group, the world's premier customer-centric management consulting firm that provides clients with world-class customer strategy, flawlessly executed, for bottom-line impact.



Mark Frei

Mark Frei is a senior vice president of sales for West Corporation, responsible for new business strategy and service development for West's Customer Management Group. Over the past six years Mr. Frei has focused on the development of West at Home into one of the nation's leading providers of home-based agent solutions. Mr. Frei is a recognized expert in the space and is a sought after speaker.

A pool of capable customer contact agents is critical to customer loyalty during a business disruption

**W**hen natural disasters or other unplanned events disrupt business as usual, a company faces more than a short-term revenue loss – the very loyalty of its customers is also at risk. How well your contact center is able to serve customers during a business disruption can have a significant impact on the long-term health of your brand and company. For this reason, continuity planning must go beyond infrastructure backup to encompass the human element of customer service. Very simply, you need to have enough people to answer the phones and help to maintain normal business operations.

In this 1to1 Executive Dialogue, Don Peppers, founding partner of Peppers & Rogers Group, and Mark Frei, senior VP of sales with West Corporation, discuss the importance of maintaining personalized customer care during a crisis, and how the use of home agents can provide a seamless level of support and service until the business returns to normal.

Given the current financial climate, can companies justify the appropriate amount of spending on “just-in-case” initiatives?

**Don Peppers:** The trust of your customers is the single most important business asset you can have. And it's easy to destroy that trust in the wake of any kind of disaster. Consider how trust is destroyed when a company inadvertently emails private information to the outside world, or discovers salmonella in peanut butter, or simply does not have the foresight to plan for a service outage. In most cases, it's a matter of carelessness. A company that really values customer trust will take steps to make sure that accidents won't happen quite so regularly.

**Mark Frei:** In these times, companies may be cutting back on investments to acquire new customers, but many are 100 percent focused on taking great care of their current

customers to try and reduce or eliminate churn. That's how you can justify the money for just-in-case situations: By making sure you have things in place to prevent major outages that could cost you a loss of customers. The question to ask is not how can you afford to, but how can you afford not to?

**How critical is the human element during these types of events, as opposed to just making sure the website or the IVR is functional?**

**DP:** It's super-critical. Too many companies think they can dispense services by robot or interactive voice response. You can process things that way, but you can't really dispense service, any more than you can get an ATM machine to smile at a customer. You can't write a business rule or a line of computer code that requires employees to delight customers. That has to come from the heart, and from the employees' own motivation to want to do it.

**MF:** This is an issue any time volumes increase unexpectedly, not just when there's a disaster or disruption. For example, when mortgage interest rates were dropping recently, mortgage companies were overwhelmed with applications. Most banks sent those applications into some sort of automated environment. But one of our mortgage partners deployed a virtual receptionist – a warm body instead of an IVR – to handle those initial calls. The customer satisfaction scores they received were through the roof. Their ability to provide some TLC around the application process worked very well during that peak seasonal need.

**Businesses generally do a good job preparing their physical infrastructure for a business disruption. How well do they plan for that same type of redundancy for their workforce—particularly call-center personnel?**

**MF:** Too often the answer is, they don't. They have great systems, technologies and redundancies in place, but they don't necessarily address the people aspect of that.

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—Don Peppers**

**What's the best approach companies can take when developing a business continuity strategy for their contact center?**

**DP:** You need a workforce that has two qualities: It's engaged in the mission and it's enabled to accomplish the mission. Enablement is the simple thing, because it involves mechanical issues: the tools, the information, the access, and the authority needed to make changes. But engagement is a much more complex and difficult-to-pin-down subject area. We're really talking about someone who is truly involved in the work and the mission, and wants to go above and beyond.

**What's the benefit of using home agents for business continuity or disaster recovery?**

**DP:** Engagement and commitment are a lot easier when you have people working out of the comfort of their back bedroom, working on their own time, being self-starters. There are a lot of companies that have at-home call center operations that work really well.

**MF:** More than 80% of our home agents have some college education. These are people who want to work, not people who need to work. That type of engagement leads to quality results for our clients.

**How confident can a company be that home agents not only are trained on the basics of customer service, but have skills specific to that business?**

**MF:** We get 4,500 applicants a week for our home-based agent positions. That type of applicant flow gives us the ability to be very selective in the hiring process. We put those people through a number of profiling tests. First, we make sure they're suited to work from home – that's a go/no go test. Second, we put them into different categories – sales, customer care, technical support, etc. Next, we put them through a profiling tool based on our partners' needs. For example, for a company in the travel industry, we make sure we have a pool of people who have experience with reservation systems. We spend time with each partner understanding their brand and their culture and create a profile of their “perfect agent.”

Then we'll take our partners' training and convert it to computer-based training. You can do a great job of communicating a company's culture to an at-home workforce if you invest the time understanding that and building it into the training.

**DP:** The culture piece is critical. Employees need to understand a company's mission, which gives them purpose. They will be more engaged with the company, which means they will be more engaged with your customers. Home agents can help to translate that purpose into a positive experience for customers.

How quickly can a company restore complete contact center coverage using home agents?

**MF:** To get the biggest benefit out of home agents in disaster recovery, you need some amount of steady-state agents that have already been trained. The number of agents we can provide during an event is directly related to the number of steady-state agents we support for that customer. For example, if we have 300-400 agents trained, and the customer is using about 100 of them as steady-state agents, we

now have a pool of another 200-300 agents we can turn to quickly.

With this type of pool, we can typically support some if not all of the need within hours. One of our customers, a big-box retailer, had a fire in its contact center. Within two hours, we had 150 home agents on the phones. In 24 hours, they were back in business. But for those 24 hours, the ability to pull in home agents was a huge benefit.

Another customer, an overnight shipper in Houston, had to shutdown when Hurricane

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## Getting it Done

### Engaged Agents, Supported Customers Best Practices to Hiring and Motivating Home Agents

In today's networked world, the balance of power has shifted to consumers. As a result, a company's brand promise is under closer scrutiny than ever. It is not just the product that matters but the entire customer experience lifecycle including consideration, purchase, service and repurchase. At a time of crisis or concern, this focus is even more intense. Contact center agents are at the heart of this customer experience lifecycle and are often times the first point of contact or, unfortunately, the last.

Study after study has shown that if the agent is happy and engaged with their job, their interaction with the customer will be more successful. The question becomes “How do you manage and monitor home agents to ensure that they are focused and productive every day?”

West has implemented several industry best practices in order to keep their agents and their customers happy:

**1. Hire right** Using sophisticated profiling, West is able to identify individuals that value the flexibility of working from home and independently. When West hires and trains an agent into this self-directed work environment, the company is immediately sending a signal to the employee that they trust them. This acknowledgment of their skills and judgement creates a deeper sense of engagement with the employee.

**2. Train to win** To protect a company's brand and enhance the customer experience, home-based agents must have access to engaging, in-depth, interactive and ongoing training. By giving the at-home agents the knowledge and tools they need to succeed, they can drive higher customer satisfaction scores that deliver long term customer loyalty.

**3. Have a coach** At West, they are called Performance Assessment Liaisons (PALs) and they provide remote support to the at-home agents. They monitor individual performance as well as share best practices across the organization. PALs also conduct quality assurance reviews and provide ongoing training. This extra support creates a more satisfied agent which leads to improved service levels.

**4. Stay connected** A virtual water cooler can be created through various online tools and West uses these tools to allow agents to share new ideas, challenges and opportunities with each other in real time. Through crowdsourcing tools, agents can tap into the collective talents of the organization allowing them to help each other and build deeper bonds.

West has implemented several industry best practices in order to keep agents and customers satisfied.

## Best Practices

- **Concentrate on the goal.** Business continuity management isn't the end—it's a means to ensuring continued customer loyalty.
- **Recognize the risk.** Disruptions in customer service can significantly impact the strength of customers' relationships with the company, placing considerable revenue at risk over the long-term.
- **Don't deny the inevitable.** The timing may be unpredictable, but the eventual occurrence of a customer service disruption is almost guaranteed—thus, being prepared is essential.
- **It's all about people.** When service personnel are engaged and enabled to delight customers, it shows—success requires people working within a culture committed to customer service.
- **Customers have memories.** Customers will long remember how they were treated, even long after they have forgotten about their immediate service inquiry—emotions are enduring, so never let quality customer service lapse.

like was about to hit. We had 24-hour notice, and our home agents were able to flex up to meet the needs of that call center.

These are people who are already regularly taking phone calls to support their customers. So the customer doesn't miss a beat.

**DP:** A crisis presents a litany of "moment-of-truth" situations with your customers. If the people closest to your customers – including customer contact agents – do not deliver a positive experience, customers will be less inclined to do business with you. They will destroy value for your company. On the other hand, if you have agents who can show empathy, and understanding, during a time of crisis or service disruption, you will increase the lifetime value of the customers you are serving. By providing them with a positive experience, they will be more inclined to do business with you, in both the short-term and long-term.

In general, how important is the call center in building longer term-customer relationships?

**DP:** Voice-to-voice contact with human beings is increasingly a service that is valued by consumers. Self-help, done in an efficient way, is good. But when you really do need service, you need to talk to someone who cares, and you can hear and feel those qualities through the phone. As we continue to automate more and more, the human element will become even more critical for handling exceptional, difficult-to-plan-for events. ■

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**West at Home** is one of the nation's leading providers of home-based customer contact solutions. West at Home helps *Fortune* 1000 companies deliver unparalleled results through a combination of higher quality, better educated agents and a highly scalable, state-of-the-art infrastructure. West at Home employs the industry's most comprehensive agent training, management and monitoring processes and features multi-layered security protection. This helps companies protect their customer data, achieve a higher level of quality service, improve staffing flexibility and realize a greater return on their investment. West at Home is a subsidiary of West Corporation, a leading provider of technology-driven, voice-oriented solutions.

For more information, please visit [www.westathome.com](http://www.westathome.com)

**Peppers & Rogers Group** is dedicated to helping its clients improve business performance by acquiring, retaining, and growing profitable customers. As products become commodities and globalization picks up speed, customers have become the scarcest resource in business. They hold the keys to higher profit today and stronger enterprise value tomorrow. We help clients achieve these goals by building the right relationships with the right customers over the right channels.

We earn our keep by solving the business problems of our clients. By delivering a superior 1to1 Strategy, we remove the operational and organizational barriers that stand in the way of profitable customer relationships. We show clients where to focus customer-facing resources to improve the performance of their marketing, sales and service initiatives.

For more information, please visit [www.peppersandrogersgroup.com](http://www.peppersandrogersgroup.com)

