

The Modernization of a Call Center

Karen Reasoner
University of Wyoming
Client Support Services, Information Technology
Laramie, WY 82070
(307) 766-2824
reasoner@uwyo.edu

ABSTRACT

The evolution of any technical support center can go through various phases. Due to increasing client demands, diversity of services and requests, and ever changing technologies that are being supported, IT departmental and procedural changes can be anticipated. This growth has required innovative strategies to be adopted across the industry; Client Support Services (CSS) at the University of Wyoming also reflects this national trend. Our goal was to incorporate call center technologies yet retain our present efficiencies and sound business practices.

In order to take advantage of new strategies, the following changes and goals were proposed:

- Providing a central call center staffed by technical personnel (Previously, each department on campus was assigned only one User Consultant, who would handle most calls individually.)
- Tracking all client contacts, including phone, office visits, e-mail, etc.
- Increase communication and accountability between IT departments
- Integrating call distribution technology

Measures of our success:

- Increased customer satisfaction in that a technical answer can be obtained quickly.
- Decreased overall response time
- Increased first-call resolution at the newly created central help desk
- Decreasing CSS's front desk, IT's main phone number, and individual User Consultant's call volume

Since these points continually presented themselves as interrelated, we also were faced with issues of changing

departmental structure. Coupled with our technology and structural change investment, we could now implement efficiencies not attainable in our previous environment.

This paper outlines processes used to establish a more effective call center, integrating basic technologies and work load management techniques. As this is an ongoing project, the presentation will also provide a status report of the University of Wyoming's Call Center project. Intended audience: those interested in implementing automation tools, call logging, and centralizing a previously decentralized call center.

Keywords

Departmental changes, call center technologies

1. INTRODUCTION

The Division of Information Technology's Client Support Services department provides computer support to faculty, staff and students at the University of Wyoming. While our department offers services and consulting to all groups, our Client Support Services' (CSS) unit personnel are currently focused on assistance to employees via departmental consulting. Approximately 2400 employee (primarily faculty and staff) clients are distributed among eight departmental consultants. Each department within the University is assigned a particular departmental consultant on which to call. Advantages of this system are in-depth knowledge of the office's technology level and IT personnel, and the opportunity to create a rapport between clients and consultants. This awareness, in turn, can afford the consultant advance opportunities to identify trouble before it blows up into an emergency, and provides a consistent IT person for the client to contact. In addition, each consultant is required to be 'On-Call', whereby they stay in the CSS main building for half a day per week. This service was enacted to provide at least one consultant on hand to handle emergency calls that required a field visit or other urgent assistance. This system has worked well, so why change?

2. HISTORY

Ten years ago a central phone number and support center existed. Since the structure of technology at that time could be divided between mainframe and micro computers, it was easy to staff and divide our support resources. Increasingly, lines blurred, especially with client server environments, demise of terminals and increase in terminal emulators on personal computer systems. Customers at that time became frustrated that there were many people they may have to contact to resolve one issue, especially if

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it spanned different disciplines. Because of this, about nine years ago User Support's structure was changed to provide "One-stop" consulting, which was described above and which we've provided since. However, with the increased call volume, lack of timely response to client requests has snowballed to the point now where most user consultants continually have numerous outstanding requests on their dockets. The most glaring lack of services provided was a place where a client could call and receive a response to quick questions (e.g. Has an account been created yet? Who do I call for a specific service? etc.)

So what could be done to help this situation? To better economize consultants' time, it made sense to re-establish a centralized phone number that clients could call to receive assistance. That way, consultants' time could be better spent on office visits, and true consulting with clients. In exchange for the anticipated shift in workload, consultants are assigned four to six hours per week manning the Call Center. Their On-Call and Call Center times can then be used to research questions, and potentially return short phone calls. The remainder of the Call Center phones would be manned by permanent Call Center personnel, both full-time and part-time employees. (Part-time employees being students.)

3. SETTING UP THE CALL CENTER/ HELP DESK: TECHNOLOGIES

A cornerstone in establishing a central help desk is providing consistency not only for clients but internally to consultants and management in their dealings with call distribution and handling. Over the course of a year, an internal IT committee was formed and chose HEAT by Goldmine (formerly Bendata) to be implemented as the call tracking software, using Oracle as our database backend platform. Other technologies also had to be considered to round out a call center: ACD (Automatic Call Distribution) functionality and a telephony mechanism to evenly distribute calls throughout a bank of phones within the call center would be needed. Due to the technology presently used at our campus and cost considerations, our choices were limited. The present solution is a UCD, or Uniform Call Distribution mechanism. Some call it the poor man's ACD, since it can route calls to a bank of phones, but currently cannot report on hang-ups or do detailed reporting. It does, however, route incoming calls to five phones, three in the Call Center room and two in the part-time student area adjacent to the Call Center.

Another consideration was to change and/or re-route pre-published and existing phone numbers in a way to most beneficial to the client. One main phone number for all of IT is HELP, which gives the client three main options: 1 for CSS and assistance with computer questions, 2 for Telecommunications (another department within our IT division) and help concerning telephone, billing and physical data connection questions, and 3 for status of computers (i.e. alert that the link to the Internet is down, etc.). Option 1 was routed to CSS' Call Center on our initial release date with little problem. We did have to train and remind Call Center personnel that general questions (because people calling HELP would invariably press one, even if that

wasn't the subject they were dialing for) were to be answered politely and re-routed to the correct IT department. Also, a non-published but well-known phone number had to be addressed. This number was manned by an office associate who mainly handled training, invoicing, software distribution, and computer equipment rental information. Because these functions would remain with this position, it was decided to advertise a new phone number for this position in advance, then funnel the well-known number's calls to the Call Center.

In customizing the software purchased for logging calls, the decision was made to reassign a full-time consultant to help coordinate the data structure and population issues, develop screens that were site specific, and coordinate all other IT departments that would potentially use the system. Included in these tasks were to analytically categorize the types of calls CSS takes. Fortunately, our Executive User Consultants reviewed and edited CSS' Business Processes, which served as the blueprint for Call Types in the call logging system. With little modification, these categories were successfully implemented into the software and seem to be very useful and intuitive. The greatest challenge of categorizing calls was to analyze how to classify each type of call. Many lively discussions ensued and refreshing new ideas emerged not only to accurately represent the potential labeling of our calls, but to rethink exactly what services we *did* provide and how we delivered them.

4. TIMELINE FOR CALL CENTER ROLL- OUT

Table 1 outlines the date timeline used to coordinate the various sub-projects involved in the Call Center rollout. The 'Go-Live' date of June 1st was essentially met June 5th. Due to holiday and vacation times, the date was postponed three days, but for all intents and purposes, we were fully functional nine days prior to July 1st.

Testing the system went smoothly, but as expected when offering a new system to people who are already extremely busy, most of the testing came in the last phases of the rollout. When consultants were required to use the system, they either shined and it was evident they did previous required work, or they were learning as they went. In reality, all interest levels mastered required skills rather quickly.

All consultants and new hires were novices when it came to forwarding incoming calls to the appropriate place and using multi-line sets. Practice made perfect, and after a total of approximately three to five full days manning the phones, most employees mastered the required techniques.

To involve and announce this service change to the university community, we involved The Partners' program, an expert computer user/consultant group formed to promote new technology and campus-wide IT-related issues. The Call Center proposal was discussed several times with this group, which made our clients more aware of the upcoming changes, and created a favorable attitude within these ranks.

Table 1. Timeline for Planning and Implementation of UW's Call Center, Spring/Summer 2000

Task name/short description	Duration of task	Initial date (or 1 st of recurring meetings)
User Info database generation	3 days	Fri 1/14/00
Skeletal system in production (in Access at least)	7 days	Tue 1/18/00
Start Testing of revised HelpDesk system -- progressively involve User Consultants	61 days	Tue 1/18/00
Semi-Weekly Meetings between CSS Manager and Call Center Coordinator	100 days	Wed 1/19/00
Pump up CSS about the system -- present weekly overviews, tips, ask for feedback	95 days	Mon 1/24/00
Customize HEAT; populate/create appropriate detail screens	20 days	Wed 1/26/00
Start initial testing within Executive User Consultant group	5 days	Tue 2/1/00
Pump up CSS about the system -- present overviews, tips, ask for feedback"	1 day	Mon 2/7/00
Staffing decisions for call center	1 day	Wed 2/23/00
Pilot Test #1 --internal testing -- UC training and testing of HEAT	15 days	Mon 4/3/00
Transfer database from Access to Oracle	4 days	Fri 4/14/00
IV 140 and 144 phone and data and UCD setup deadline	6 days	Fri 4/14/00
Met with Directors on integrating Systems folks into the project	1 day	Fri 4/14/00
Met with Operations Manager and coordinate Operators schedules	1 day	Thu 4/20/00
Present to UW Expert Users Group -- Ask for test Div/Colleges by two months prior to rollout date	1 day	Thu 4/27/00
Small sessions of training on IV 144 phones and procedures	2 days	Thu 5/4/00
Plan PR for rollout	7 weeks	Fri 5/5/00
Announcement to testing areas (for one consultant)	1 day	Mon 5/8/00
Pilot Test #2 -- individual consultant	5 days	Wed 5/10/00
Pilot Test #3 -- multiple consultants	5 days	Wed 5/17/00

5. ADVANTAGES WE'VE SEEN SO FAR

Internally, CSS' highest level of support comes from IT's System Development department. These employees provide development and maintenance of our main computing systems such as NT domains, networking, UNIX and IBM mini-computer system, legacy administrative systems, and client-server environments and equipment. Consultants employ them as an additional resource for solving problems when CSS resources had been exhausted, but as happens with IT on a industry-wide basis, incomplete research (i.e. asking dumb questions), incomplete requests, and no mechanism to track previously answered questions between these departments resulted in frustration (within both parties). Happily, the Call Logging system has provided a means whereby the inquiring party sits down and accurately, completely describes the situation and all necessary components of the problem. It also prompts the person to draw on other resources such as Microsoft's TechNet first, before bumping up the problem to the next higher level of technical advice. Ultimately we envision utilizing the

knowledge base and expert system built into the Call Management software to further assist with technical questions.

It's also taken some time, but assigning call tickets (the name for each call record) to groups of IT employees has been helpful. This group assignment enables consultants working the Call Center, or anyone with spare time and adequate knowledge, to investigate a group of tickets marked as ready to research, call back, or requiring only simple work to complete the call.

6. CHALLENGES, NON-ISSUES, AND ITEMS FOR FUTURE IMPLEMENTATION

As with any major change which has direct bearing on the way people carry out their work responsibilities, this project was filled with dynamic changes. Replacing old mechanisms and ideas with new technology proved to be challenging. Constantly keeping the employees involved that are targeted to be users of the system is pivotal. While a deluge of meetings was not desirable, neither was absence of a sense of community and involvement in the

project. Towards the end of testing and our official release date, we found ourselves short three full-time positions, which greatly impacted our plans immediately after the rollout. A dynamic staffing schedule coupled with student hirings helped immensely, but it was a struggle to not allow our work processes slip back into more familiar, old, less productive habits.

A challenge that came back from last decade: the frequent caller would call back at different times and get different consultants. The old result: with no centralized call tracking, we'd have five consultants all working on the same problem with none of them knowing the problem was already on someone else's ToDo list. The current system has proved useful in identifying these clients and minimizing CSS's resources for each problem (not each time it's reported). This does take practice in effectively using the call tracking system to look up outstanding tickets for each caller/contact.

Another big fear was having many calls entered ambiguously under 'Question', or causes that were entered as 'Unknown'. In reality, this has not been an issue and all consultants are conscientious to accurately categorize calls and resolutions. Student workers in initial stages or other CSS employees that are new to the system or consulting find it more difficult, supposedly because they possess a limited knowledge and lack depth of the various types of incoming calls.

Consultants are not consistent in how they initially track calls. Many still write information on paper and then transfer them to the Call Logging system. The most effective users and greatest supporters of the new system understood why the change was needed (to provide better service to our clients) and actively took part in planning and testing the system. Their clients, in turn,

utilized the Call Center most and found the most benefit. In time, we hope all clients will feel the same.

Using specific examples in our bi-weekly meeting of how the new system is making a positive difference in our workload has been a great help, as has providing Call Logging and telephony tips and one-on-one training each time a consultant works the Call Center. By seeing that their clients are happier having some questions answered through the help desk, they see their call load even out and IT providing superior service at the same time.

As with all new changes, it has been slow and difficult at times. Sub-projects we'd like to see implemented in the future include:

- Incorporate student information, or potentially use the HEAT system on another database for IT's Academic Support Unit personnel.
- Utilize the call tracking system's web interface, thereby allowing clients to enter in tickets/requests themselves, and allowing them to check on the status of existing requests.
- Create better reporting, both for telephony systems and in the Call Tracking system.
- Identify peak usage periods, client loads, call tracking success
- Continually add additional and improve existing detail screens, which aid first-time consultants in more easily answering questions.
- Incorporate the rest of IT into division-wide use of the call tracking, escalation techniques, and potential project management utilization.