

Don't let technology (or lack of it) get in the way of customer data

In the April issue of *Customer Service Newsletter*, Trevor Spunt of IBM Global Business Services looks at ten “people management” issues that service managers should be concerned with. Here he looks at a number of technology-management issues that managers should look into as well.

An area in which customer service managers sometimes fail their reps is in ensuring that the technology that's available to support the use of and access to service data is used as efficiently as possible. In particular, that the data that agents have access to and make use of — both for background reference and what they are sharing with customers — is up to date and accurate.

In other words, “What's the reliability of the information?” asks Trevor Spunt, senior consultant in CRM global strategy for IBM Global Business Services.

In particular, “You may want to look at the reliability of the information that's being added to the system. If agents themselves are responsible for doing that — particularly in the case of customer data — you will want to look at the accuracy of that,” Spunt says. “And training and coaching may be necessary to ensure accuracy.”

In some cases, access to the information itself can be difficult. “We have gone into some organizations and found quite frequently that it is difficult for agents to obtain the information that they need to do their jobs. Sometimes that's because the necessary information is not stored in the system, or data is difficult to find

in the system because of the way that information is organized, or because of the reliability of the system itself.”

As a result, reps try to search for something, and it takes several minutes for a response to come back. “That can certainly hamper the ability of reps to be effective in their jobs,” Spunt says. “And that's something that managers need to look at.”

Another issue that customer service managers should look at is “the route through which agents receive information,” says Spunt, and this may or may not involve system technology.

Think of the different ways of handling an agent's inability to respond to a customer's issue or concern immediately, or the need to refer to some other source to gain information. Are agents required to call some centralized person who is more senior to assist them with the information? Is there a log or ticket system in which an agent can make a note about the inability to address a customer concern immediately and that will prompt him or someone else to get back to that customer when the data is available? “There's no right or wrong way to do it necessarily,” says Spunt, “as long as the manager knows that they are effective and efficient.”

Technology-wise, managers also need to look at the number of different databases or pieces of software one needs to access in order to get information. “Sometimes IT departments layer application upon application so at some point you have so many applications that it's difficult for agents to get to the information that they need, or even to enter different customer data,” says Spunt. “At that point, the system becomes very cumbersome and inefficient, and it will affect not only the customer experience, but the productivity of agents, with average handle time declining over time.”

Potential fixes are to create an overlaying software system that does the searching for agents, and brings all of the necessary information from various applications to their screens in a logical way, or purchasing new software that will allow you to store all of the necessary information in one place.

Another issue is whether information is available at all. For instance: “How often is the equipment or the system down? Does the company have a disaster recovery plan for all of the data, whether reference data or customer data? If a fire or other event destroys information that the call center depends on, can that data be

accessed elsewhere? Do you have multiple locations so that if a call center is down, calls can be routed to and information accessed at another location?" asks Spunt.

A final issue related to technology is customer self-service. When customers call in for information, do they have to go to a live agent, or can they access the information that they need through an interactive voice response (IVR) system or through the company's website? If customers don't have that option, Spunt says, "managers should be monitoring the

types of calls that they get on a quarterly basis, looking at their call types, and asking themselves the question, 'Is there a way to provide this information in a more cost-effective way to our customers?' And beyond being just cost-effective, can you provide it in a customer-friendly and customer-efficient way, so customers have a better experience as well?"

If a company has anything like an internal list of frequently asked questions (FAQs), they can put the answers to these questions on their company websites rather than on a piece of

paper taped to reps' monitors. In addition, says Spunt, companies can seek to automate simple transactions, like orders. "Companies could create the necessary functionality to place orders over the Web, or submit a work order or work/repair requests. There are many different things that can be done via IVR or over the Web today that would both reduce the need for live assistance and improve the customer experience."

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