

Moving From Workforce Manager to Call Center Leader Through Strategic Planning

By Ric Kosiba, President, Bay Bridge Decision Technologies

If you were to Google “managers versus leaders,” you would get well over 500,000 hits. There are many business consultants and experts selling books and seminars, each promising to “turn” us from managers into leaders.

Those of us in the workforce management field know that a good portion of our job is pure management in nature: managing the chaos inherent in large people-intensive operations, managing and monitoring performance to hit strict performance goals, and managing the expectations of the operations executives whose bonuses depend on us hitting these performance goals. Our organizations need both managers and leaders, and the best leaders are good managers and vice versa. So how do we become both good managers and good leaders?

Becoming a Leader

Many workforce managers are already there.

In a general sense, there are many paths to organizational leadership. But the most common paths (not associated with nepotism, etc...) include becoming a trusted advisor to those in current leadership roles. The folks who step into leadership are those who help the big boss do well. When I got my first real job, my father gave me simple advice: make your boss look good.

As workforce managers, we are in a unique position in the call center—our executives absolutely must lean on us to keep the operation running smoothly. We are responsible for making our company’s most expensive resource—its people—work efficiently. If we do our job competently, we will have a significant bottom-line impact.

We are also relied upon for our analytical abilities. We are often called on to present staff plans and to perform “what-if” analysis. Through these types of analyses, we can shape company policy. We’re in a great spot.

Another quality prized among leaders is the ability to “see the future” and help steer the organization to meet it. Again, as workforce managers, we’re poised to help the current call center executives see this future. It is usually our job to put together call forecasts and plans to meet these forecasts.

And we have a special advantage on the road to call center leadership—we are the owners of much of the data that drives the organization and many of the important strategic decisions.

Why Aren’t We a CEO Yet?

So why aren’t all CEO’s former workforce management professionals? My experience suggests that there are quite a few top executives that have spent time doing workforce management and related jobs. But what do we have to do in order to become thought leaders in the organization?

I believe that we have to harness the power of analytics and spend more time doing strategic planning and analysis. We need to be the person who answers the tough, but important what-ifs. We need to proactively perform analyses that challenge the basic assumptions and goals of our organization. We need to make a difference for our execs and for the company by truly improving the profit picture of our enterprise.

Colin Powell once said, “Experts often possess more data than judgment.” It is our job to provide our execs with both data and judgment.

The good news is that this should be relatively easy and straightforward. The catch is, and you probably have guessed it already, we must get out from under the piles of day-to-day tactical work that fills our time. If there is anything truly holding us back, it is the amount of chaos we have to manage. We simply cannot find the time to do important strategic analysis or to create the tools necessary to allow us to do important

and far-reaching analysis quickly and accurately.

For now, let’s leave how you find that extra time to do strategic planning to you. Let us instead focus on some of the big picture items that we can help improve for our companies.

Determining Your Optimal Center Configuration

There has been a lot of this going around lately? How do I configure my call center network to allow me to:

- 1) **Take advantage of cheaper labor pool.** This was almost THE question of 2004, with the hubbub over off-shore outsourcing during the election year. I don’t know many contact center groups who haven’t looked into outsourcing.
- 2) **Reshuffle the contact center network to gain efficiencies through skill-based and network routing.** Opening and closing contact centers is almost a national pastime. Skill-based routing has been implemented or un-implemented across industries. Skill-based routing certainly is still a hot topic, and configuring it well is not always easy to achieve.
- 3) **Reduce capital and other costs.** The whole point of workforce management is to reduce costs by efficiently allocating resources.
- 4) **Increase profit.** We have begun to see industry thought leaders implement sophisticated and very targeted cross-sell programs with considerable success. These programs cannot be successfully implemented without serious workforce management and planning analysis.

What should we do to make center configuration wins happen? For us to lead, it requires us to proactively propose alternatives to our executives. Look for

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the opportunity, analyze it, and pitch the idea to our bosses and their bosses.

All this is much easier if you've developed or purchased the analytic infrastructure to help crank through alternative scenarios.

Service, Revenue, and Profit Goals

Determining the appropriate service, revenue, profit goals, and the related staffing should be a periodic and seasonal exercise.

Last month, I visited a call center working through several advanced what-ifs. They decided to do an analysis of their optimal service goal and compare the analytically derived goal to the service goal that had been in place for years at his company. Lo and behold, the mathematically optimal service goal was much higher than that the enterprise had been employing, and the "dollars left on the table" was significant. This extra analysis is sure to change the impression of the call center as only a cost center, and help executives to think of the center more as a source of revenue. And they'll likely change their service philosophy and make the company some serious money.

Hiring, Termination Plans, and Budget Scenarios

In a sense, any analysis that we perform should manifest itself into a budget plan. If we reconfigure the call center network, change our service goal philosophy, or perform any other significant what-if analysis, the idea will result in a change, for the better, to our overall plan.

Any new big picture idea should be run through the plan to determine the change to customer service, revenues, costs, and the number of service failures. It is the best way to determine and present the overall value of our ideas. It is a good idea to automate the staff planning and budget planning process.

Moreover, we have the ability, and with some investment in time and technology, to make the plans themselves more efficient. By focusing on the timing of new hires and/or terminations, you can reduce costs significantly. Linear and integer programming technologies can produce mathematically optimal plans, considering seasonality, employee attrition, learning curves of new employees, etc... There is real money here.

Getting the Message Out

While it may be straightforward, given our focus on analytics, to perform important what-ifs, it is not always easy to get the word out. Often, because you may have been tagged as someone who manages very tactical things, you may be looked at as someone who does not see the big picture. You need to break out of that mode.

It is important that you stick out your neck to make the attempt. You cannot expect that each analysis will be implemented or even heard, but if you do your homework and propose noteworthy change, you'll be relied upon for the next exercise.

Once you develop a reputation for your ability to perform strategic analysis and see the big picture, you will get to do more of it. My bet is that a promotion is in your future—if only to provide more time to do this important analysis! Over time you will certainly become known as a leader.

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No Time for Training or a Meeting? Try a Lunch & Learn!

January through mid-April is peak season in our center, and time off the phones is extremely limited. One approach to consider for non-essential training and meetings is a "Lunch & Learn."

Lunch & Learns are generally informal, open-house settings that agents can voluntarily attend during their scheduled unpaid lunch. The person delivering the training or chairing the meeting is available for several hours over the lunchtime. Agents can come and eat their lunch, ask questions, hear discussions, and learn from the questions others raise. We've found offering an enticing dessert increases attendance!

The format has worked great for offering follow-up training after a new product or process is introduced. Our IT department has used it to address agents' specific how-to questions. HR has held Lunch & Learns to address questions related to a new policy. The key is the agents want to attend a Lunch & Learn if they can improve a skill, have a question answered, or a concern addressed. They'll attend on unpaid time if they see a personal benefit. Center management encourages attendance, but it remains voluntary. Best of all – the workforce management team doesn't have to schedule a thing!

Note: This tip is provided by Jennifer Behrens of Thrivent Financial for Lutherans. She may be reached at jennifer.behrens@thrivent.com.

