Hawthorn
FOUNDATION

Task Force for Call Center Transformation
Final Report
November 2019-February 2020

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Executive Summary

Have you ever had a poor experience with a call center? Do you wish there was something that could have been done to improve your experience?   Often, the only direct experience Missouri citizens have with state government is through our 145 call centers operating over 17 agencies. In order to deliver the best possible service for our citizens, the Hawthorn Foundation convened a task force of experts in call center and customer experience to develop recommendations for us to transformation the state government's approach to its call centers.

In the following report, we will describe the activities that took place, the guiding principles we considered throughout the task force, and the recommendations being made to the call centers. We will identify the "quick wins" driving improvement today, the mid-term goals for improvement, and the long-term strategies to turn Missouri's call centers into a positive experience for our citizens every time they call.

Efforts to improve the citizen experience were happening prior to the task force implementation. In early 2018, Ken Zellers, Director of the Missouri Department of Revenue and retired Anheuser-Busch alum, reached out to the Anheuser-Busch call center with a couple benchmarking opportunities. The working relationship grew through these interactions, tours of our operation, and partnership in the *Department of Revenue Road to 100* (https://dor.mo.gov/news/newsitem/uuid/4cdc19ff-afce-4e8f-9e4c-0ff63630bbb0). Following the success of the *Road to 100*, and successful task forces on both fleet management and facilities management, Chief Operating Officer, Drew Erdmann, requested additional assistance to take an enterprise approach to improving the level of service the State of Missouri is providing to its citizens. In 2018, the State of Missouri received 14.4 million calls or approximately two touch point per citizen. By taking a focused, more efficient approach to those interactions, we will be able to deliver better results for our citizens.

On November 20, 2019, the Task Force for Call Center Transformation convened in Jefferson City. Membership included stakeholders from across Missouri; drawn from business, labor, academia, government, and civic economic development. Hawthorn is the only institution in the state that convenes these diverse stakeholders to help strengthen Missouri's economy and improve the effectiveness of its state government. The task force members reviewed state agency information and data as well as provided input through a panel-like format. Meeting formats and data requests were based on task force requests, to gain an understanding of call center operations over the course of the limited interactions. In between formal meetings, task force members held conference calls and communicated between agencies on initiatives. The task force completed its work in February of 2020.

State and Participating Organizations
The Hawthorn Foundation would like to thank the following individuals for their contributions to the Task Force for Call Center Transformation.

Governor's Office
Drew Erdman, Chief Operating Officer
Summer Shaw, Director of Management Initiatives

Office of Administration
Sarah Steelman, Commissioner of Administration

Missouri Department of Revenue
Ken Zellers, Director of Revenue

Missouri Department of Social Services
Sara Smith, Deputy Director, Children's Division

Missouri Department of Health and Senior Services
Lee Pearson, Chief, Office of Performance
Management

University of Missouri
Ryan Rapp, Vice President for Finance

Missouri Attorney General's Office

Missouri Department of Agriculture

Missouri Department of Commerce and Insurance

Missouri Department of Conservation

Missouri Department of Corrections

Missouri Department of Economic Development

Missouri Department of Elementary and Secondary Education

Missouri Department of Higher Education and Workforce Development

Missouri Department of Labor and Industrial Standards

Missouri Department of Mental Health

Missouri Department of Natural Resources

Missouri Department of Public Safety

Missouri Department of Transportation

Missouri Secretary of State Office

Missouri Treasurer's Office	
Accenture	
Anheuser-Busch/InBev	
AT&T	
BJC	
Calabrio	
CISCO	
Commerce Bank	
ConvergeOne	
Enterprise Holdings	
Evergy	
Genesys	
Global Technology Solutions, LLC	
Towner Communications	

WiPro

World Wide Technology

Approach

Over the course of 12 weeks starting in November 2019, 96 call center managers, telecom and technology experts, and executive leaders across 15 different private sector companies and 18 State of Missouri agencies contributed their time and expertise to help the taskforce reach a final portfolio of initiatives. The workshops were structured in a way to capture a large amount of ideas and continue to narrow down until the final workshop to create a refined set of initiatives.

Workshop #1 (November 20, 2019)

- Introduced objectives

- Surveyed existing State of Missouri capabilities and performance

- Identified initial set of potential initiatives

- Aligned upon five major transformation themes to focus next steps

- Toured state call centers (optional)

External partners: Develop best practice presentations

Workshop #2 (December 18, 2019)

- Introduce Portfolio of Initiatives framework

- Review external best practices across five major transformation themes

- Refine set of potential initiatives

- Tour state call centers (optional)

External partners: Develop mini-business case for priority initiatives

Workshop #3 (January 30, 2020)

- Validate business cases for individual priority initiatives

- Refine overall Portfolio of Initiatives

- Identify key success factors and implementation requirements

External partners: Finalize report

Workshop #1

The State of Missouri held its first workshop regarding call center transformation. The meeting was held at the Lewis and Clark building in Jefferson City on Wednesday, November 20. It was attended by various external experts in the field of call centers and internal State of Missouri call center managers. The workshop consisted of introductions, presentations from four departments within the State of Missouri, and a breakout session focusing on creating a portfolio of initiatives.

Introduction:

Drew Erdmann, Chief Operating Officer for the State of Missouri, gave the workshop's opening remarks. The introduction included a thank you to the external partners and State of Missouri internal experts. The goals of the taskforce include effort to increase focus on citizen's experience, to invest in our people, and to create a partnership with private sector experts to develop recommendations to transform the State of Missouri call centers. Getting to the "why" of the project to transform our call centers revealed the following:

- In 2018, the State of Missouri received 14.4 million calls which equates to about two touch points per citizen
- Call centers are our citizens first, and sometimes only, direct point of contact
- 4 percent of our total state employee workforce work in a call center

An overview of the timeframe for the taskforce was provided.

- Early December WebEx follow-up

- December 18 workshop #2 in Jefferson City
- Early January WebEx follow-up
- January 30 workshop #3 in Columbia

Drew Erdmann discussed the lack of standardized data for all the call centers across the State of Missouri and the hope that this taskforce will ask the right questions and get back to the basics of data collection and analysis.

State of Missouri Call Center Presentations:

Presenters from the Department of Revenue, Department of Health and Senior Services, Department of Labor and Industrial Standards, and Department of Social Services discussed the structure of their call centers, the data they use, challenges they encounter, and any recent program successes. The data tracked from the call centers was similar in all departments.

The most common data points included:

- Call type & length
- Incoming calls
- Abandoned calls
- Deflected calls
- True call handle rates
- Average hold time
- Average max hold time
- Documents processed
- Staffing levels
- Call quality

A. **<u>Department of Revenue (DOR):</u>** Ken Zellers, Director of Revenue, and Susan White, Department of Revenue, presented on the driver's license, motor vehicle, and taxation call centers located with the Department of Revenue. The call centers receive phone calls related to business taxes, individual taxes, and motor vehicle and drivers licenses.

   <u>Challenges:</u>
   - Reaching and maintaining 100% of calls answered
   - Employee retention and staff burnout
   - Peak hour staffing
   - First time resolution – Answering the customers question during the first call

   <u>Successes:</u>
   - Online return tracker with text and email alerts
   - Develop scripts
   - Educational program
   - Utilize Jabber amongst team members to get customer questions answered sooner
   - DORA – Virtual Chat bot

B. **<u>Department of Health and Senior Services (DHSS):</u>** Jessica Bateman, Department of Health and Senior Services, discussed the call center she manages which focuses on determining a level of care score for seniors and adults with disabilities. The call center completes preliminary eligibility assessments for Missouri's Medicaid eligible senior citizens and adults with disabilities to enable them to remain as independent as possible in the least restrictive environment.

   <u>Challenges:</u>

   - Retention
   - Professional development
   - Staff coverage
   - Data reporting
   - Staff-supervisor ratio

   <u>Successes:</u>

   - DHSS' Lean Six Sigma Team conducted a time study and developed recommendations to reduce the number of outbound calls and improve the true call handle rate. After implementing a number of the recommendations, the call handle rate increased from 38% to 82% in three months.

C. **<u>Department of Labor and Industrial Relations (DOLIR):</u>** Jared Brockman, Department of Labor and Industrial Relations, described their largest call center which focuses on unemployed Missouri citizens who have earned wages within the past 18 months. Call Center team members have rotating duties with about 40% of their time devoted to working the phones.

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Challenges:

- Peaks and valleys in call volume
- Coordination of work activities across four locations
- Balancing acceptable customer service levels with claims processing performance expectations

Successes:

- Implementation of a self-service claim filing system which allows team members to focus more on other more manual duties
- Standardized duty rotations
- Upcoming triage initiative which will allow the department to assign work by complexity level

D. **Department of Social Services (DSS):** Casey Gilmore and Nichole Conway presented on two call centers within the Department of Social Services. The two call centers described were located within the Children's Division and the Family Support Division.

Challenges:

- Staffing a 24-hour hotline in high stress environment
- Fluctuation in volume and hold times
- Redundancy support for statutorily required 24/7 operations
- Technology
- Constant policy changes

Successes:

- Answered 100% of calls in 2019
- Upgraded the online reporting process
- Implementation of nesting areas for newer team members
- Upcoming initiative – a more robust IVR

The room was then opened up for questions. Question will be combined to a running question and answered document provided before the next WebEx meeting.

Breakout Session:

The workshop then had a breakout discussion session designed to identify initial opportunities for improvement based upon time to impact, familiarity or ease of implementation, degree of impact, and reach. The workshop was divided into small groups comprised of internal experts and external partners with a facilitator (~5 per table, with 15 table's total). The table's recommendations were captured on flipcharts and will be sent to the group once the data has been analyzed. Each table shared their top recommendation in a plenary session.

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The workshop's top recommendations were then included in a live interactive poll to identify what the group judged to be the top 5 most important opportunities for the Task Force to consider in its future sessions. These 5 top topics are:

1. Assessing current systems and approaches
2. Establishing centralized, standard operating procedures and reporting of key performance indicators (KPIs)
3. Improving people processes – including recruiting, onboarding, training, and incentives
4. Introducing more citizen-centric design – including mapping customer experience journeys
5. Leveraging the potential of Artificial Intelligence (AI) – ranging from predictive analytics to enabling new service models (e.g., chat bots)

Conclusion:

Drew Erdmann thanked everyone for attending and went over the next steps. The entire group took a photo to mark the first workshop. After the workshop about 30 taskforce members visited two different call centers within the Department of Social Services. The feedback has been very positive and those that attended found the experience very valuable.

Workshop #2

The State of Missouri held its second workshop regarding call center transformation. The meeting was held at the Lewis and Clark building in Jefferson City on Wednesday, December 18. It was attended by various external experts in the field of call centers and internal State of Missouri call center managers. The workshop discussed what has occurred since the last workshop, described the upcoming presentations from five external partners, and the format for the working lunch with facilitated discussion/evaluation of 47 initiatives.

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Introduction:

Drew Erdmann, Chief Operating Officer for the State of Missouri, gave the workshop's opening remarks. The introduction included a thank you to the external partners and State of Missouri internal experts. The goals of the taskforce include efforts to increase focus on citizen's experience, to invest in our people, and to create a partnership with private sector experts to develop recommendations to transform the State of Missouri call centers. The goals for the workshop were discussed.

- Portfolio of Initiatives – The State of Missouri wants to have a portfolio of initiatives by the end of February. Drew Erdmann showed a visual representation of a portfolio of initiatives. This is a common approach to rank initiatives with a focus on time to implement, level of state government familiarity, and scale of impact.
- External Partner Presentations – Five external partners presented on themes which appeared from workshop #1.
- Scoring of Initiatives - 47 initiatives will be scored over a working lunch to identify a top 10 focus and further condense it to a top 3.

External Partner Call Center Presentations:

Presenters from Towner Communications, Anheuser-Busch/InBev, Genesys, BJC and Accenture presented on five themes which came from Workshop #1 including assessing current systems and approaches, establishing centralized, standard operating procedures and reporting key performance indicators (KPIs), improving people process, introducing a more citizen-centric design and leveraging the potential of advanced technology.

   A. **Towner Communications:** Keith and Julie Towner presented on accessing the State of Missouri's current system and discussed why evaluating the enterprise capabilities is step one.

Summary:

- Introduction:
  - Do you even know what you're capable of?
  - Is Missouri utilizing their people capital wisely?
  - Is Missouri utilizing their investment wisely?
  - Does Missouri already have everything they need to be outstanding for their citizens?
- Assessing the complete system:
  - Each business unit within the enterprise needs its own physical and health assessment.
    - Parts to access
      - Self-service, training, reporting objectives, workflow analysis, integrations, existing network topology, current ACD/Queues, future enhancements, and technical environment.
- Diagnose the complete system:
  - What does Missouri have but isn't using?

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- o What does Missouri have but doesn't need?
- Common themes in high functioning call centers:
    - o Positive culture, leverage MOH, educate citizens and staff, self-service options, emotion detection, gamification, Omni channel expansion, and stay current with advanced technology.

B. **<u>Anheuser-Busch/InBev:</u>** Joseph Trueman presented on introducing a more citizen-centric design with a focus on why it's important and practical ways to implement.

Summary:

- Introduction:
    - o "Keep people happy without giving away the house, and you're going to increase customer loyalty".
    - o Focus on consumer wants, not what the enterprise wants to provide.
- Use of a self-service portal:
    - o Eliminates non-value added steps
    - o Chat-bot increases efficiency, email is delayed and phone calls make the most valuable connections.
        - ▪ Phone is the most expensive interaction, constantly trying to eliminate phones calls for those that don't want to call (chats and emails).
- Metrics:
    - o Customer satisfaction is the most important to Anheuser-Busch/InBev.
    - o Capture everything to understand the caller, how many times have they called and why?
- Consumer Connections:
    - o AB/InBev calls their call center consumer connections as they focus on selling an experience.
- Key tasks:
    - o Brand building, risk mitigation, early warning detection system, upselling and cross selling products.

C. **<u>Genesys:</u>** Scott Dunn, Ivory Dugar, and Jodi Thompson presented on establishing centralized, standard operating procedures and reporting key performance indicators.

Summary:

- Introduction:
    - o The data needs to be used to create an actionable strategy.
    - o What does good data look like?
        - ▪ Integrity: Is it relevant to business, agency, and service?
        - ▪ Insight: What are you measuring?
        - ▪ Audience: Are your customers' needs being met?
        - ▪ Actionable: Are you meeting your baseline? If not, do something about it.
    - o It is a balancing act between KPIs, outcomes, and standards to create an ideal customer experience.
- Standard operating procedures:

- o Omni channel: analyze all sources of contact and every journey
- o Standardized: define what the metrics are, what formulas to use, what reports to publish
- o Thresholds: one size does not fit all, some businesses cannot answer all calls
- Handling difficult calls
  - o Separate the mandated reporters from the citizen calls, mandated reporters will be more efficient with less emotion, citizens will take longer to process emotions and assure anonymity
- Final thoughts:
  - o Trust in the organization, increase your customer satisfaction by one point and you will increase the citizen's trust

D. **BJC:** Julie Bruns presented on improving people process including recruitment, onboarding, training and incentives.

Summary:

- Introduction:
  - o Call center work is hard, creates pressure, high emotions, repetitive and draining.
- Recruiting:
  - o Hire by attitude, train for technical components and how to dig for details, hire for the right reasons, BJC utilizes pre-hire shadowing to understand a day in the life before they apply.
- Caring for staff:
  - o Understand and empathize, give them the information and tools to succeed, empowering staff to solve the caller's problems or follow an escalation path
- Making the work fulfilling:
  - o Support from leadership, connection to the mission, consistent feedback, informal check-ins, engaged and present leaders
  - o Secondary trauma
    - Leads to compassion fatigue and burn-out, support the staff when calls are difficult, offer breaks, check in to see if more support is needed, and provide resiliency training
  - o Remote agents
    - 90% of their staff work from home, higher productivity, flexible staffing but harder to stay in touch and build a sense of a team
    - Utilizes the FISH philosophy

E. **Accenture:** Michael Gallagher presented on the potential of advanced technology ranging from predictive analytics to enabling new service models.

Summary:

- Introduction:
  - o Citizens expect a better and consistent user experience across all channels.
- Virtual agents:

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- o Smart assistants that interact with people and machines to harness the power of advanced technology to inform, support and advise to meet challenges and goals.
  - o Benefits
    - Increased quality
    - Improved customer experience and engagement
    - Improved flexibility
- Real life Solution:
  - o Michael played a video of how chatbots have revolutionized the customer experience in Ireland within the Office of Revenue.

Breakout Session:

The room was setup in 15 tables with five at a table. The tables were made up of external partners and internal experts. The attendees worked in pairs to rank 47 initiatives based on timeframe, level of familiarity, primary type of impact and scale of impact. The second part of the breakout session consisted of each table identifying their top 3 initiatives by rank and in no particular order identify 10 initiatives the State of Missouri should implement. After the workshop, the team compiled the results to identify the most important initiatives.

Group's recommendations including "top 10" votes:

- Citizen Satisfaction Survey – After the call (3 votes)
- Agent Desktop Standardization (2 vote)
- Establish KPIs/Standardized Metrics/Dashboards (14 votes)
- Career Mapping/Formal Training/ Personality Assessments/ 360 Feedback (25 votes)
- Flexible Work Schedule (3 vote)
- Incentives/ Recognition/ Rewards (3 votes)
- Change Call Center Name (5 votes)
- Change Vision (3 votes)
- Omni Channel (5 votes)
- Customer Service Relationship Management (2 votes)
- Employee Retention (4 votes)
- Enhance Websites/ Improve Customer Education Online (7 votes)
- Process and QA Automation (32 votes)
- Extend Work Hours to include Call back time (1 vote)
- Process Mapping (8 votes)
- Workforce Management (3 votes)
- Flexible Work Schedule (1 vote)
- Employee Retention (4 votes)

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Conclusion:

Drew Erdmann thanked everyone for attending and went over the next steps. Taskforce members again had the opportunity to visit two additional State of Missouri call centers within the Department of Revenue and Department of Labor and Industrial Relations. Feedback continues to be positive and Anheuser-Busch/InBev came forth as the external partner lead to create the final taskforce report.

Workshop #3
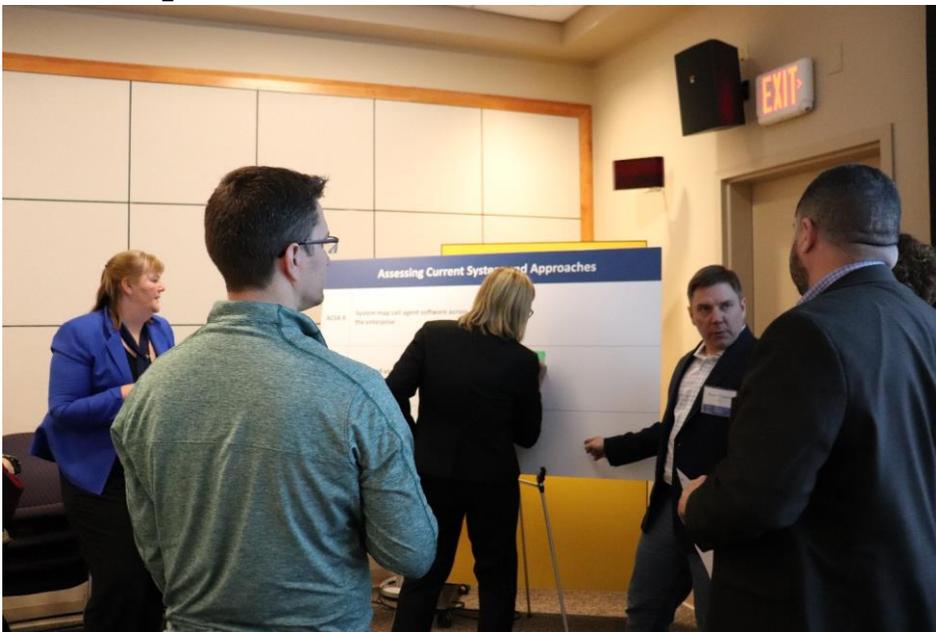
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The State of Missouri held its third workshop regarding call center transformation. The meeting was held at the University of Missouri – General Services Building in Columbia, MO on Thursday, January 30. It was attended by various external experts in the field of call centers and internal State of Missouri call center managers. The workshop provided a summary of the two previous workshops. A qualitative exercise was performed to finalize the core initiatives. The working lunch included an open discussion on how the State of Missouri should organize at the enterprise level to transform its call center operations. The workshop concluded with a "thank you" to all participants and an appreciation photo plaque was provided courtesy of the Hawthorn Foundation.

Introduction:

Drew Erdmann, Chief Operating Officer for the State of Missouri, gave the workshop's opening remarks. The introduction included a thank you to the external partners and State of Missouri internal experts. The goals of the taskforce include efforts to increase focus on citizen's experience, to invest in our people, and to create a partnership with private sector experts to develop recommendations to transform the State of Missouri call centers. A summary of the entire taskforce process was reflected upon.

- **Workshop #1 breakout session** - identified initial opportunities for improvement based upon time to impact, familiarity or ease of implementation, degree of impact, and reach.
    - Over 200 initial initiatives identified.
    - Five themes emerged:
        - Assessing current systems and approaches.

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- - Establishing centralized, standard operating procedures and reporting of key performance indicators (KPIs).
  - Improving the people process – including recruiting, onboarding, training, and incentives.
  - Introducing a more citizen-centric design – including mapping customer experience journeys.
  - Leveraging the potential of Advanced Technology – ranging from predictive analytics to enabling new service models.
- Between workshop #1 and workshop #2, the 200 initial initiatives were consolidated to 47 initiatives.
- **Workshop #2 breakout session** - asked for further ranking of the 47 initiatives based on timeframe, level of familiarity, primary type of impact, and scale of impact. The participants then provided their top 10 initiatives the State of Missouri should implement.
- After workshop #2, the team further narrowed the list of initiatives to 23 core initiatives.

Breakout Session:

The room was setup with five poster boards reflecting the five themes identified from workshop #1. The 23 core initiatives were placed on the boards within their respective themes. Facilitators were placed by each board and the participants were asked to cast three votes for initiatives the State of Missouri should implement and one vote for an initiative the State of Missouri should not invest in.

- **Groups Qualitative Insight's:**
  - Understanding why our citizens are calling was overall agreed upon by the taskforce. Discussion included the need for customer journey mapping to occur before implementation of other initiatives. Comments included:
    - Before the State of Missouri can improve, we need the information on why citizens are calling specific call centers.
    - Without understanding our citizens other initiatives may fail without the adequate information.
  - Once an understanding of citizen calls has been determined, process mapping should be completed. Comments included:
    - A baseline of the process as it is today should be identified, as other initiatives depend upon an efficient process to be successful.
  - The initiative of establish statewide KPIs and standard metrics/dashboards was considered a "must have" by the taskforce. Comments included:
    - Improvement cannot occur without tracking data.
    - Standard KPIs allow call centers to identify a target and establishes a road to achieve set goals.
  - There was a large discussion on advanced technology and the importance of sequencing the implementation of initiatives. Comments included:
    - Omni-channel routing should be implemented before a shared knowledge base, natural language processing, and chat bots.

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- Omni-channel provides multiple ways for citizens to communicate with the State of Missouri. It can help automate the way the State of Missouri Call Centers work and frees agent time.
  - Shared Knowledge base, natural language processing, and chat bots should be implemented together as they all relate to each other.
    - This type of advanced technology can greatly help provide answers to citizens but it is important to understand the capabilities and limitations of this type of technology.
  - Improving call center websites was discussed as a "must have" with the need to fully understand what questions the citizens are trying to answer.
- The taskforce was in agreement on designing call centers around citizens. Again, the need to understand why citizens are reaching out to the state needs to be studied.
  - Common discussion occurred around rebranding current call centers to be named citizen contact centers.
- The theme of improve people process within call centers received the most votes for not expending any State of Missouri resources to implement. While the external partners believe in improving the people process, they felt a lot of these initiatives are currently occurring across the State of Missouri. The initiative of Cross Functional Call Takers was deemed unnecessary if the other more important initiatives are implemented as the volume of phone calls should decrease.

Metric Discussion:

A discussion on the specific metrics that need to be measured, and at what level, was introduced to the group. The external partners provided their most important metrics prior to the workshop. Prior to surveying the external partners, the number of metrics was consolidated to 28. The external partners were then given a survey to rank each metric by need and level. Need included must have, important, nice to have, and N/A. Level included what level in state government should be tracking the data; statewide, department, call center, and individual agent. Using the external partner recommendations, the metrics were consolidated to include only those which received six must have votes or higher, and presented to the group at the workshop. The following metrics were discussed during the metric discussion.

- Abandoned Calls – (statewide, department, call center)
  - An abandoned call is one in which the citizen disconnects before they are able to talk to an agent. If the goal of a call center is to take care of its citizens then you have to know how many citizens are not staying on the line long enough to talk to an agent.
  - Abandoned Calls cannot reach zero as citizens may receive their answers from the teleprompt while on hold in the queue.
- Deflect Calls – (statewide, department, call center)

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- - Not deemed as important as abandoned calls as deflected calls can be reduced by increasing the queue.
- Average Handle Time – (statewide, department, call center)
  - Can be a powerful metric as long as the call center understands how to use it. An example provided was if the average handle time is 3 seconds higher than normal then the manager knows they need an additional team member answering the calls.
  - Although quick call times allow agents to take more calls, it is important that the focus is not so heavy that the agents lower their quality of customer service to resolve a call quickly.
- Citizen Satisfaction (statewide, department, call center, individual agent)
  - While looking to drive down metrics, it is important to make sure citizens are satisfied with their service. Trying to reduce average handle time might not necessarily increase citizen satisfaction.

External partners discussed the importance of keeping metrics as simple as possible because the need to understand and the proper management of data is more important than the quantity of metrics. Discussion on call center and individual agent level will be expanded upon in a future WebEx with external partners. In regards to individual agent metrics there was a debate on whether allowing agents to see data they can't control or only logged in/ready/not ready information.

Working Lunch:

During the working lunch, the taskforce was asked how the State of Missouri should organize at the enterprise level to deliver its priority initiatives and the adoption of standard best practices across its call centers. Change management was discussed by multiple task force members along with developing a clear, concise communication plan. Drew Erdmann described how the State of Missouri is undergoing a transformation not just in call centers but enterprise wide.

A discussion of starting at the biggest need or the biggest success was also had. The discussion was mixed but starting small, getting quick wins, and celebrating the successes was in wide agreement before tackling a complicated project.

Conclusion:

Drew Erdmann thanked everyone for attending and discussed the final steps. Attendees were presented a photo plaque to show appreciation for their participation in the Taskforce for Call Center Transformation. The final steps include Anheuser-Busch/InBev coordinating and completing the final report by February 17, the State of Missouri reviewing by February 20, and a press release with a website update on February 26.

Recommendations

The task force followed a clear set of guiding principles, outlined below, when reviewing recommendations to ensure that the State of Missouri takes a strategic and citizen-focused approach to improving the call center performance.

- Will this recommendation help the citizens of Missouri today, in the next year, or years down the road?
- Is this recommendation focused on improving the experience for the citizen or for the State of Missouri?
- Is this recommendation going to have the biggest impact for our citizens using the resources we have at our disposal?
- Will this recommendation improve the work experience for team members of the State of Missouri?

Portfolio of Initiatives
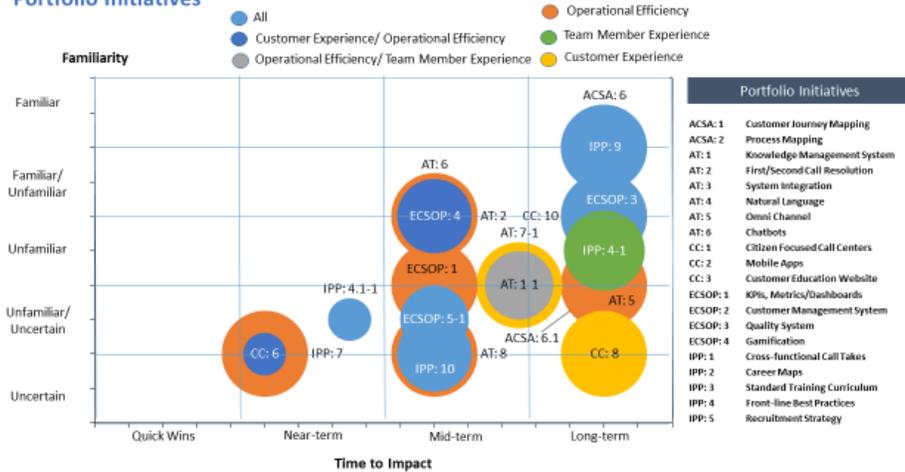
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Opportunity	New Initiative #	Initiative Name	Description
Assessing Current System and Approaches	ACSA:1	Citizen journey mapping	Citizen Journey Mapping will help highlight and identify areas of opportunity in current systems, processes and staffing to ensure the needs and expectations of Missouri citizens are met.
Assessing Current System and Approaches	ACSA:2	Process mapping standards across the enterprise	Standardizing process maps across all call centers will highlight areas which can be improved creating efficiences across the enterprise.
Advanced Technology	AT:1	Shared knowledge management system	A shared knowledge management system will allow different types of analytics to shape citizen service and citizen behavior.
Advanced Technology	AT:2	First and second call resolution	First and second call resolution is a key indicator of citizen experience, satisfaction, efficiency, and overall operational performance.
Advanced Technology	AT:3	Identify and integration of current system's and technology	Call center team members have multiple screens and programs in use at one time creating difficulty in training, finding information, and increases the call time for helping citizens. Learning the current capabilities of the State of Missouri call system and intergrating them across the enterprise can reduce hold times of citizens, increases efficiency, increases moral and saves cost.
Advanced Technology	AT:4	Natural Language	Assess potential Natural Language applications to state governments.

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Advanced Technology	AT:5	Omnichannel routing	Omnichannel routing provides a Single Routing, Queuing, Context and Reporting Engine for communication channels in a unified environment. Agents will be able to engage with customers on every channel from a single intuitive agent desktop
Advanced Technology	AT:6	Assess where chatbots can be used across the enterprise	Chatbots can alleviate strain on contact center employees while improving the citizen experience and controlling costs. Automating common interactions and providing self-service to citizens gives agent more time for meaningful work.
Citizen Centric	CC:1	Citizen focused call centers	By designing call center operations around the needs of the citizen, satisfaction will increase, repeat calls will likely decrease, and staff will be more engaged and satisfied because they are empowered to meet the citizen's needs.
Citizen Centric	CC:2	Mobile apps	Mobile applications will enhance the State's ability to service citizen requests through timely and frictionless experiences to allow immediate and direct visibility into their information.
Citizen Centric	CC:3	Website re-design across the enterprise	Self-service applications on the State of Missouri's websites are, presently, underutilized. Clarifying website layout design and updating it to reflect the ever-evolving best practices of the Internet would be a very strong step towards improving asset engagement.
Establishing, centralized, standard operating procedures and reporting of KPIs	ECSOP:1	Statewide KPIs and standard metrics/dashboards	Goals and objectives are critical elements for any measurement system and foundational for determining how well contact centers are performing.
Establishing, centralized, standard operating procedures and	ECSOP:2	Customer relationship management system	Increasing the number of citizens who use self-service options available on the State's websites will ultimately reduce the number of calls that are made to the State's call centers.

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reporting of KPIs			
Establishing, centralized, standard operating procedures and reporting of KPIs	ECSOP:3	Quality management/monitoring	The goal for every call center is to move from a transactional day-by-day operation to one that supports the organizations long-term strategic objectives and goals. Creating a call center quality assurance framework is the foundation from which these goals can be achieved.
Establishing, centralized, standard operating procedures and reporting of KPIs	ECSOP:4	Gamification	Assess potential for gamification in call centers across the enterprise
Improve People Process	IPP:1	Cross-functional Call Takes	
Improve People Process	IPP:2	Call center career mapping	Exploring a call center career ladder that is tied to attributes such as individual agent metrics (ability to demonstrate proficiency); attendance and timeliness (reliability); participation in committees, projects, team activities (leadership); caller satisfaction scores (customer service). This will lead to a better work environment; higher employee morale; sense of purpose and the possibility of career advancement.
Improve People Process	IPP:3	Standardized call center training curriculum	Standardizing the training curriculum across state call centers will improve proficiency, accelerate training, reduce turnover and improve the employee experience.

Commented [WM1]:

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Improve People Process	IPP:4	Standard front-line operational excellence best practices in call centers	Visibility of key metrics and goals will improve awareness of performance and motivation for improvement. This will result in better caller experience, lower abandonment rates, and better speed of answer. Having easy to access dashboards will also make it more efficient for management to consistently convey priorities and metrics to all staff.
Improve People Process	IPP:5	Call center recruitment strategy	By creating a specific State of Missouri call center recruitment strategy, we will primarily improve operational efficiencies – while also improving the agent experience, resulting in reduced agent attrition.

Full Business cases included in the Appendix below.

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Metrics

Introduction

Key Call Center Metrics for the State of Missouri

Enterprise
Governor, Citizens
1. Customer Satisfaction
2. Answer Rate
3. Call Center team member staff levels

Department
Department Director,
Executive Management Team
1. Call Volume
2. Average Handle Time
3. Cost per Call
4. Average Wait Time
5. Containment Rate

Call Center
Call Center Manager
1. CSAT Score
2. First Call Resolution
3. Call Reason Codes
4. Service Levels
5. Calls in Queue
6. Adherence to Schedule
7. After Call Work
8. Deflected Calls
9. Abandoned Calls

Call Center Team Member
1. Quality Assurance Score
2. Citizen Satisfaction Score
3. Adherence to Schedule
4. Individual Handle Time

<u>Metric Recommendation</u>

Given the importance and immediate need the taskforce held additional problem solving calls after workshop #3 to refine its recommendations. The taskforce developed initial recommendations for metrics or measure at these levels.

Statewide

Department

Call Center Manager

Call Center Team Member

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Organizing for success

The task force recommends that the COO establish the following actions:

- Quick Wins: Can be implemented in the coming months with the current resources the state has
  - Capture and classify all interactions using the technology the agencies already have. Using something as simple as the Microsoft Office Suite, each agency can begin to aggregate the types of calls they are receiving.

- Near-Term: Can be accomplished with the current resources, but will take 3-6 months to implement
  - Map current processes to establish a baseline for improvement.
  - Once processes are defined, identify quick wins for improvement.
  - Establish standard KPIs and standard metrics/dashboards.

- Mid-Term: Can be accomplished with additional resources and will take 6-12 months to implement
  - Implement a Customer Relationship Management (CRM) tool that will allow standardization of the data categorization within each agency.
  - Establish a routine to review current processes to identify areas of opportunity for improvement

- Long-Term: Can be accomplished with additional resources and will take 1-2+ years to implement.
  - Implement an enterprise CRM tool that not only allows intra-agency standardization, but will also allow inter-agency information sharing and data standardization.

Conclusion

The Task Force for Call Center Transformation completed in February 2020 with a portfolio of initiatives to help direct and lead the state of Missouri in improving citizen contact. Often, the only direct experience Missouri citizens have with state government is through our 145 call centers operating over 17 agencies. Over the course of 12 weeks starting in November 2019, 96 call center managers, telecom and technology experts, and executive leaders across 15 different private sector companies and 18 State of Missouri agencies contributed their time and expertise to help the taskforce reach a final portfolio of initiatives. The task force followed a clear set of guiding principles when reviewing recommendations to ensure that the State of Missouri takes a strategic and citizen-focused approach to improving the call center performance. The portfolio of initiatives created is a direct impact of a large state wide collaborative and shows the State of Missouri can learn to be effective and efficient while keeping a citizen minded focus on improving citizen experience. The Task Force for Call Center Transformation committee wants to thank all of the external partners, state of Missouri call center experts, and all the volunteers that made the breakout sessions run smooth. Everyone

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involved should be proud of the work that was completed and know that it will have a direct impact to the citizens of Missouri.

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Appendix

Initiative business cases

Assessing current systems and approaches

Customer journey mapping Business Case – Theme # ACSA: 1

1. **Project Problem Statement**

State Call Centers are not currently meeting the service levels or satisfaction levels that represent the experience our citizens deserve.

2. **Business Need**

Customer Journey Mapping will help highlight and identify areas of opportunity in current systems, processes and staffing to ensure the needs and expectations of Missouri citizens are met. This will be achieved by helping with:

- Higher customer satisfaction;
- Lower agent churn; and
- Better advocacy from customers.

3. **Project Impact**

Customer Journey Mapping has been shown to:

- Reduce transfers – more than half of customer interactions (56%) involve multi-channel involvement.
- Process transformation – by identifying operational inefficiencies, you can lower the cost to serve by as much as 20%.

4. **Return on Investment (ROI)**

Customer Journey Mapping will help identify the actual ROI – but as stated above, studies show you expect up to 20% savings from process improvements. There are both hard and soft benefits that can be expected such as:

- Operational Efficiencies – reduce transfers, ensure proper staffing levels for time of day/week/month/year, reduce customer wait time, call shed from repeat callers;
- High Quality Information – Will give invaluable customer data related to call reasons, call types, call patterns and additional information to help transform the customer experience;
- High Quality Customer Service – Customer service and customer experience will be improved through process improvements and information gained from mapping; and
- Hours Saved – By better understanding our customers and their patterns, we can optimize staffing and agent hours by having the right people in the right teams at the right time.

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5. General Description

Utilizing a set of Customer Journey Mapping, we can utilize a side by side comparison of how the business operates today versus how the business can operate tomorrow. By comparing these two versions of the business, we can easily determine possible savings and maximize existing resources (employees and processes) – allowing us to invest in new resources (systems and processes) to further serve our citizens.

In order to look at all the information, we need to look at a set of Journey Maps:

- Current State Mapping – Shows how our customers are interacting with us "right now". Current State Mapping is more about the State systems and processes. These maps aid in visualizing the customer experience process. They can show us:
    - Why customers call the State;
    - Are they getting to the right place the first time (without transfer);
    - The entire call length (wait time to get an agent, time spent with agent, time on hold, time between departments in transfer); and
    - Allows us highlight inefficiencies, process improvement, and possible savings.
- Future State Mapping – Gives us the opportunity to outline (based on Current State Mapping) what we want the items above to look like:
    - Define the start point and the endpoint; and
    - Plan the message - In order for future mapping to work, the interactions and touch points have to be pre-planned. Resources need to be created, funnels need to be set up, and teams needs to be trained.
- Day in the Life Mapping – This is more about our customers than our current processes. It allows us to identify our customer's journey and the pain points associated with it. For this to work, we need to identify:
    - Goals – What do we want the customer experience to be?
        - 100% Answer Rate
        - 1st Call Resolution
        - 85% Customer Satisfaction
    - Pain Points – What stands in way of these goals today?
    - Timing Indicators – What day/week/month present more/less challenges?

6. Owner

Owners of the Project should be:

- Department Director
- Division Directors
- Workforce Management Team
- Information Technology
- Communication and Website liaison

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Skills Needed:

- Business Analytics
- Journey Mapping Subject Matter Expert (Internal or External Sources)
- Project Management
- Call Center
- Systems/IT

Background Suggested:

- Call Center
- Workforce Management
- Customer Experience

7. Other Key Success Factors

Data obtained from Customer Journey Mapping may require additional resources for initiative to:

- Hire additional agents
- Add additional system/cloud capabilities
- Consider third party call handling solutions

8. Previous example of impact

N/A

9. Initiative scoring

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)		Pilot (1-2)	
Familiar/Unfamiliar (3-4)		Small (3-4)	
Unfamiliar (5-6)		Medium (5-6)	
Unfamiliar/Uncertain (7-8)	X	Large (7-8)	X
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	
Quick Wins (1)		Customer experience	X
Near-Term (2)		Operational efficiency	X
Mid-Term (3)	X	Team member experience	X
Long-Term (4)			

10. Top 3 metrics

Compare before/after metrics in the following areas:

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1. Customer Experience Metrics – customer satisfaction
2. Service Levels – Answer Rates, AHT, Transfers, etc.
3. Agent Retention – Reduce new agent training costs

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Process mapping standards across the enterprise Business Case – Theme # ACSA: 2

1. **Project Problem Statement**
State of Missouri call centers do not have standardized, consistent operating procedures.

2. **Business Need**
The State of Missouri needs to standardize process mapping for workflows across all call centers. Call center agents may handle calls differently from one another, leading to operational inefficiencies, repeat calls, along with higher call hold and talk times. The lack of documentation prevents the State from being able to identify possible process improvements in their call centers. This also creates inefficiencies in training programs and agent coaching adding frustration among agents who are unsure of how best to answer questions from citizens. The net effect is agent confusion and dissatisfaction that leads to agent churn, along with increased operating costs.

The processes in place are not adequate to deal with the high call volumes experienced by the State's call centers. This impacts the experience of both team members and customers and reduces the effectiveness of the call centers through the State's various agencies.

3. **Project Impact**
Standardizing the use of process mapping would enable team members to work much more effectively and will provide multiple benefits to the State's call centers.

   A. Reduced Repeat Calls

      Standardized processes reduce the number of different responses from agents for the same questions and the amount of confusion of the calls. This will reduce the number of repeat calls and call handle time which will increase contact center capacity without adding additional agents.

   B. Reduced Call Handle Times, Hold Times and Abandonment Rates

      Identifying the best way to handle certain call types will help call center team members resolve calls more quickly, resulting in shorter hold times for callers in the queue and fewer callers hanging up due to long hold times.

   C. Identify Pain Points and Opportunities for Improvement
      The process of mapping will reveal common pain points for call center operators. Identifying these opportunities and finding ways to fix them can help streamline the processes that team members use during calls.

   D. Create References for Training
      Process maps can be valuable resources during the training of new call center team members and serve as references for the best methods to handle calls.

   E. Improved, Consistent Interface

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With standardized processes for each department, agents will be able to provide more consistent answers to questions and inquires which will lead to increased confidence for both citizens and agents, resulting in higher levels of satisfaction. Consistent answers to questions will also reduce the number of repeat calls and escalations by reducing the number of citizens "shopping" for the answers they want.

4. Return on Investment (ROI)

There is potential for a 25% to 30% productivity improvement over 5 years based upon the State's ability to execute on improvement recommendations and action plans that result from mapping call center processes.

The State was able to handle 4,757,091 calls in 2019, totaling 75,335,362 minutes. 948,235 calls were abandoned. At a similar rate, a 25% improvement would result in 5,946,364 calls being handled in the same time, 1,189,273 more calls than the current total and more than the number of calls abandoned.

5. General Description

Process maps can be created using software the State is already familiar with, such as Visio. The State has already created call center flowcharts that lay out how incoming calls are routed. The State can start by identifying what the most common call types are and map the most efficient way each call can be handled.

Once mapping is complete and rolled out, the State would need a vehicle to evaluate if the new/documented processes are being followed and if they are producing the desired results. While existing QM programs that typically evaluate 1% to 20% of your calls can provide some insight into process adherence, it is recommended that a commercially sold analytics application be considered. These applications are designed to analyze unstructured data (calls) and provide actionable insights to facilitate change.

6. Owner

Owner skill set:

- Project Management
- Call Center Subject Matter Expert in Process Mapping and in Analytics

Owners:

- Department Leads
- Call Center Leads
- Process Mapping Lead
- Process Mapping Working Team
- Analytics Lead

7. Other Key Success Factors

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- Further initiatives to capitalize on opportunities for improvement
- Further initiatives for software updates/replacements, such as CRM, ERP, and call agent systems
- Further initiative for analytics software

8. Previous example of impact

At a global bank in the US, introducing process mapping along with automation and business analytics resulted in a 30% increase in productivity over 5 years. Errors and turn-around times were reduced for loan-calculation processes, resulting in the quality rate rising from 86% to 98%+. The client was able to save $30M over five years, generating a ROI of 4 times their initial investment.

9. Initiative scoring

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)		Pilot (1-2)	
Familiar/Unfamiliar (3-4)	X	Small (3-4)	
Unfamiliar (5-6)		Medium (5-6)	
Unfamiliar/Uncertain (7-8)		Large (7-8)	X
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	
Quick Wins (1)		Customer experience	
Near-Term (2)		Operational efficiency	X
Mid-Term (3)	X	Team member experience	
Long-Term (4)			

10. Top 3 metrics

1. Average Talk Time

2. First Call Resolution Rate

3. Rate of Abandoned Calls

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Establishing centralized, standard operating procedures and reporting of key performance indicators (KPIs)

Statewide KPIs and standard metrics/dashboards Business Case – Theme #ECSOP: 1

1. Project Problem Statement

The lack of KPIs and standard metrics across State contact centers makes it extremely challenging to evaluate agent performance and know if commitments to citizens are being met.

2. Business Need

Goals and objectives are critical elements for any measurement system and foundational for determining how well contact centers are performing. KPIs and metrics measure performance against established objectives. Setting baseline standards across all contact centers will provide a roadmap leading to best in class support.   Dashboards that compare performance results against KPIs will provide visibility into how well you are doing in meeting your commitments to citizens and the empirical information needed to manage each State department and facilitate change.   You can't manage what you can't measure.

KPIs are typically divided into two groups. One is more aligned with center level performance and the other agent level productivity. While inherently interrelated, they are managed differently. Chart below.

3. Project Impact

A. Identify areas of Untapped Capacity

KPIs can be built to identify and monitor agent behaviors and processes that are limiting the State's ability to answer all the calls passed to agents that end up being deflected. Establishing clear standards and KPIs, along with the tools to measure where you are meeting and/or missing those KPIs, is the first step in mitigating the issue. KPIs for areas like agent utilization, schedule adherence, long call AHT, holds, silence time and others are prime targets. It is not uncommon to identify improvement opportunities that could add a 10% to 20% productivity lift, without hiring additional agents.

B. Identify Performance Gaps

KPIs are established to monitor the items and areas that have the greatest impact on your ability to provide the level of service committed to the State and its citizens. With clearly established KPIs and standard metrics it will be easier to identify areas where performance gaps exist and what can be done to mitigate issues. Note that different departments can have different KPIs and even different benchmarks based on the responsibilities and charters which will require adjustments.

C. Identify Outliers

With standard metrics and KPIs it will be easier to identify performance outliers and how far off from established objectives you are. More importantly, you will be able to identify the

source of the issues (Root Causes) to understand if, for example, there is a process issue or if specific agents are the source of the issue.

D. You Can't Boil the Ocean
We all know this expression. KPIs and standard metrics allow you to pinpoint areas that are causing you to miss commitments to citizens. With business issues (root causes) isolated, it is easier to implement improvements and to track and monitor results to ensure desired outcomes.

E. Reduce Subjectivity in Evaluating Performance (especially true for union environments)
With benchmarks established for each KPI, it becomes easy to baseline performance by contact centers, teams and individuals and to identify where you are exceeding and/or missing commitments to citizens. Armed with this empirical information your management team will have a much easier time coaching and "modifying agent behavior" to achieve more desirable outcomes.

F. Drive Sustainable Improvement for Department Level Operational Improvements
Standard metrics and KPIs provide the platform for improvement at the individual, team and department level by providing visibility into specific areas requiring attention. In addition to identifying agent behavioral issues, more importantly you will have visibility into process defects. Updating and modifying processes will have a larger and more sustainable impact than fixing individual transactions. Why fix one at a time when you can fix hundreds or thousands.

G. Dashboards Built for Management, Supervisors and Agents
Well-constructed dashboards provide visibility about performance for all KPIs and metrics, allowing all stakeholders QUICK access to the information they need to effectively manage their area of responsibility. Best in class dashboards are easily customized based on your role in the organization and responsibility level. It should also contain real-time as well as historical information and allow you to "drill through" to the underlying data for additional granularity for decision making. There are typically three primary levels for dashboards.

1. Sr. & Upper Management Dashboards: Provide an overview of the most important KPIs and metrics used to ensure the center/department is meeting its commitments to citizens
2. Mid-Management/Supervisory Dashboards: KPIs to ensure the center/department is running smoothly but also include KPIs around Quality metrics and performance outliers.
3. Agent Dashboards: These concentrate on each agent's performance and how they are performing against other agents with similar skills, their teams, or other groups.

4. Return on Investment (ROI)
Labor costs typically consume 55% to 65% of operating budgets. Studies have shown that contact centers with poorly developed or no standard metrics, KPIs or established performance baselines

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waste 5% to 25% of their labor costs due to operational inefficiencies. Direct savings can be realized through:

A. Increased call handling efficiency and effectiveness (more calls handled/day)
B. Improved agent utilization (published standards help in self-management)
C. Lower costs associated to QM programs (more objective evaluations and fewer disputes)
D. More efficient and effective transaction processing in the back office
E. Lower training costs from more targeted retraining programs (fewer agents and specific content)
F. Lower agent attrition due to less subject evaluation and frustration

While actual ROI will vary based on existing operational performance levels and your ability to execute on improvement recommendations and action plans, it is reasonable to expect a 10% to 12% reductions in operating expenses by establishing KPIs and managing to them.

5. General Description
There are two components to address this issue and drive improvement. NOTE: Metrics are measurements and KPIs are measurable values against specific objectives.

    a. Creating and prioritizing KPIs and metrics: (This can and should be done internally for each department contact center or BO group processing transactions)
    b. Managing to established KPIs and metrics: (To do this effectively will require commercial software)

The BO transactions include items like, appointment scheduling, processing claims, updating documents, processing tax refunds, etc. Attached is a list of standard KPIs for contact centers and Back Office (BO) transaction processing groups.

Primary KPIs and Metrics	
Contact Center KPIs/Metrics	**Performance & Quality KPIs/Metrics**
Service Level	Productivity (Calls/Applications Processed / Scheduled Hour)
# of Calls Offered, Handled & Abandon	Effectiveness (Calls/Applications Processed / Worked Hour)
% of Calls Offered, Handled & Abandon	First Call Resolution
Calls in Queue	Call Hold Time
Deflected Calls (Blocked/Busied Out Calls)	Average After Call Work Time (ACW)
Login - Not Ready / Available	Call Transfers
Average Wait Time	Reopen Rate (Quality Metric)
Average Hold Time Average Talk Time (ATT)	Claims / Applications Completed
Average Handle Time (AHT)	Claims / Applications Quality
Calls Deflected	Schedule Adherence/Conformance
IVR Containment Rate	Transaction Processing Error Rates
Forecast Accuracy	Attendance
Cost per Call/Transaction	Sentiment
Customer Satisfaction Scores (CSAT)	
Customer Effort	**Note:** Performance & Quality KPIs/Metrics can be applied to both Contact Center work (Calls/Chat/Emails) and/or Back Office work (Transactions Processed)
NPS Scores	

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6. **Owner**

   Owner skill set:

   - Contact Center Management
   - Call Center Subject Matter Expert
   - Project Management

   Owners:

   - Contact Center Management
   - Department Leads
   - Call Center Leads
   - Team Supervisors / SMEs

7. **Other Key Success Factors**

   N/A

8. **Previous example of impact**

   N/A

9. **Initiative scoring**

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)		Pilot (1-2)	
Familiar/Unfamiliar (3-4)	X	Small (3-4)	
Unfamiliar (5-6)		Medium (5-6)	
Unfamiliar/Uncertain (7-8)		Large (7-8)	X
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		Type of Impact	
Quick Wins (1)		Customer experience	
Near-Term (2)	X	Operational efficiency	X
Mid-Term (3)		Team member experience	
Long-Term (4)			

Note: There are really two different initiatives to this business use case. The first, creating and prioritizing KPIs is relatively simple. Most teams should be familiar with the concepts and you should be able to get some quick wins with a medium impact. The second phase which will require software evaluation and Cap-X to implement is more mid to long term with a large-scale impact.

10. **Top 3 metrics**

    1. Create the list of KPIs, standardized it (as much as possible) and prioritized for all departments?

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2. Socialize the KPI and explain how and why they will be used to evaluate individual performance and to help identify training or process gaps that make it difficult for agents to effectively support citizens.
3. If not currently used, roll out a dashboard solution with the flexibility to control the dissemination of information (KPIs and metrics) in real-time and historical. It will also need to be role based to ensure people can only access information with their scope/level or authority.

11. Please list other reference material

Following are the most common reports used within Cisco Unified Intelligence Center

Historical Reports
>   Call Type Historical
>   Agent Skill Group Historical
>   Agent Historical
>   Skill Group Historical

Real Time Reports
>   Call Type Real Time
>   Skill Group Real Time
>   Agent Real Time

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Customer relationship management system Business Case – Theme #ECSOP: 2

1. Project Problem Statement

The need for a solution that connects a constituent with all applicable agencies to provide a consistent and predictive experience.

2. Business Need

It's the trouble of nearly all government information systems. Every agency collects the same information about the same group of citizens but stores it in separate databases that can't talk to each other. When agency employees need to share data between systems, they laboriously re-enter it into the next database

3. Project Impact

1. Save Time

2. Motivate Employees

3. Identify Trends as they happen

4. Create Business Strategy

5. Improve internal processes

6. Identify at-risk constituents

7. Create constituent-centric focus

4. Return on Investment (ROI)

Here are some examples that have hard and soft benefits that can be expected. And how CRM can help Missouri improve performance and save money.

- Enhanced Informational Organization - CRM can break through silos and make information available across an entire organization. When proper dashboards are implemented, CRM allows users to see customer data across departments. While filters can be set to limit access, customer data can be stored and easily accessed by any user throughout the organization.

  This is incredibly helpful for public institutions with several customer facing departments, and whose customers easily run into the millions.

- Constituents as Customers - Many public organizations have customer transactional data that rivals or even surpasses that of private corporations. Thus, it is vital that the best customer management technologies are used.

  We don't usually think of constituents as customers, but the same technology that improves business to customer relations, can be used to help governance to constituent relationships

- Routine Task Automation - Missouri generates an enormous amount of forms, files, paperwork, and reports. These tasks all consume time, money and effort both to generate and

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to consume. Implementing CRM automates these tasks, freeing up greater time and resources for employees, while also minimizing human error.

- The average ROI for CRM is $8.71 for every dollar spent.
- 47% of CRM users said that their CRM had a significant impact on customer satisfaction.
- 2% of companies rate CRM tools as impactful or very impactful.
- 74% of businesses improve customer relationships with CRM.

5. General Description
N/A

6. Owner
Project Owner:
- Agency Director
- Division Directors
- Division SME
- Information Technology

Skills Needed:

- Business Analytics
- Business Process
- Project Management
- Call Center
- Systems/IT

Background Suggested:

- CRM
- Call Center
- Reporting/Analytics
- Customer Experience

7. Other Key Success Factors
- Cloud vs Premise deployment based off State and Federal Regulations.
- Consider deploying agencies that service the same constituents for a better customer experience.
- Data Modeling and agency consumption
- Dedicated Super-User familiar with agencies
- Sufficient training
- Define CRM Strategy and CRM Philosophy

8. Previous example of impact

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N/A

9. **Initiative scoring**

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)		Pilot (1-2)	
Familiar/Unfamiliar (3-4)		Small (3-4)	
Unfamiliar (5-6)	x	Medium (5-6)	
Unfamiliar/Uncertain (7-8)		Large (7-8)	x
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	
Quick Wins (1)		Customer experience	x
Near-Term (2)		Operational efficiency	x
Mid-Term (3)	x	Team member experience	x
Long-Term (4)			

10. **Top 3 metrics**

1. Customer Satisfaction

2. Average Time to resolution

3. Cases Closed same day

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Quality management/monitoring Business Case – Theme #ECSOP: 3

1. Project Problem Statement

Track and improve the quality of interactions that employees have with constituents.

2. Business Need

Agencies need to evaluate the quality of their interaction to identify opportunities for improvement, but it's not efficient to evaluate very single interaction. Agencies need a way to distinguish important from routine interactions and then generate results in a consistent and automated manner, while positively impacting the customer experience and handle times.

3. Project Impact

- Improvement in Employee Attrition
- Increased revenue, claims and case processing, due to Improved Resolution of Business Outcomes
- Reduction of Handle Time
- Reduce Supervisor Effort
- Monitor and Grade 100% of the interactions in all channels.

4. Return on Investment (ROI)

- The benefits from monitoring can be both objective and subjective. While "improving customer satisfaction" is difficult to quantify, the savings associated with a reduction in turnover is not.

- Some key metrics that you can track to identify the benefits of your monitoring system include:
  • Manhour reductions (through more efficient operations)
  • Training cost reductions, from both more targeted training and reduction in turnover
  • Reduction in supervisory or quality assurance staff
  • Increase in first call resolution

5. General Description

The goal for every call center is to move from a transactional day-by-day operation to one that supports the organizations long-term strategic objectives and goals. Creating a call center QA framework is the foundation from which these goals can be achieved.

A strategic call center QA framework focuses on these processes:

- Understand and correlate the connection between customer experience, customer sentiment and QA
- Review and consider QA from a senior leadership or executive board level perspective
- Evaluate consistent QA as a senior management key performance indicator
- Encourage agent self-scoring to raise levels of self-awareness and adopt positive customer behavior

A call center QA framework can also favorably impact the following factors:

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- Net Promoter Score (NPS)

- Customer Satisfaction

- QA as a key differentiator

6. Owner
Quality Administrator

- Create policies that automatically occur on interactions with a specific agent, duration, or other criteria. Policy actions include deleting, retaining, and assigning an evaluation for an interaction.
- Assign interactions and quality evaluation forms to quality evaluators.
- Design and publish evaluation forms.
- Coordinate the calibration process.

Quality Evaluator

- Review recordings of interactions.
- Score interactions using evaluation forms.

Agent

- View evaluations of customer interactions.
- Comment on evaluations.
- Acknowledge evaluations.

7. Other Key Success Factors
Success Factors for your scorecard might include:

- **Conversation opening**: How well did the agent open up the conservation? Did they demonstrate their willingness to listen and follow the company's guidelines for opening a conversation?

- **Identification**: Did the agent identify the customer's issue, understanding their pain?

- **Exploring the issue:** How well did the agent listen to the customer's story to understand every facet of the issue they were facing?

- **Offering solutions and information:** Did the agent follow all necessary processes to offer options and solutions to solve the customer's issue?

- **Resolving the issue:** Was the issue completely resolved by the end of the call so that they will not need to call again?

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- **Checking in with the customer:** Before hanging up, did the agent confirm that all customer pain points were addressed and that they were satisfied with their interaction?

- **Closing and wrap up:** Did the agent successful close the conversation with the customer and then record key details of the interaction afterward?

8. **Previous example of impact**

The Problem: Inconsistent Management

A video and data service provider wanted to achieve more efficiency and consistency across all their multiple call centers with an eye towards a future consolidation into one center serving several markets

The Cause: Lack of Organizational Synergy

Procedures, where they existed, were not shared across call centers and many were simply not documented. Roles and responsibilities were not standardized. The Quality Assurance teams operated independently with no corporate oversight or coordination.

The Solution: Training and Coaching

The customer restructured its QA team around the following goals:

- tracking and developing quality standards across all service-engagement fronts,
- ensuring that established processes and quality standards are followed,
- ensuring quality interactions are occurring consistently,
- leading periodic reviews, surveys and process audits to implement realignment,
- driving efficiencies to better utilize resources, and
- communication and calibration of companywide performance standards.

The Result: Customer Satisfaction Improved

After four months noticeable improvements were seen. Customer Satisfaction surveys (which had been modified to measure for the behaviors that agents were now being trained on) showed a 60% improvement in customer satisfaction (CSAT). First Call Resolution (FCR) was up 8% and the Transfer Rate (XFER) was down 20%. Quality Calls per Hour (QPH) – a composite measure that includes first FCR and Average Handle Time (AHT) was up 8%. Agents were more confident and better equipped to resolve customer concerns, resulting in more satisfied customers.

9. **Initiative scoring**

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)		Pilot (1-2)	
Familiar/Unfamiliar (3-4)		Small (3-4)	
Unfamiliar (5-6)	x	Medium (5-6)	X
Unfamiliar/Uncertain (7-8)		Large (7-8)	
Uncertain (9-10)		At Scale (9-10)	

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Time to Impact (1-4)		Type of Impact	
Quick Wins (1)		Customer experience	X
Near-Term (2)	x	Operational efficiency	X
Mid-Term (3)		Team member experience	
Long-Term (4)			

10. Top 3 metrics

1. Handle Time

2. Customer Satisfaction

3. First Call Resolution

11. Please list other reference material

N/A

Task Force for Call Center Transformation

Improving people processes – including recruiting, onboarding, training, and incentives

Call center career mapping Business Case – Theme #IPP: 1

1. Project Problem Statement

High turnover in MO call centers negatively impacts productivity, citizen experience and staff morale.

2. Business Need

High turnover creates a barrier to answering 100% of citizen calls. Dis-satisfied employees may project their negativity when answering calls. Having a career path with defined goals and rewards can improve retention and engagement.

3. Project Impact

Better work environment; higher employee morale; sense of purpose and the possibility of career advancement.

4. Return on Investment (ROI)

It is estimated that employee turnover in a call center costs between $10-20K in direct expenses, mostly the time to train a new agent to proficiency. Other costs include the time for recruitment, interviewing, and developing a training plan. Onboarding a new employee also pulls other staff off of the phones to train. Other costs may include overtime or bonus pay to help provide coverage during staff shortages due to turnover. This does not include the customer service issues.

Using $15K as an average cost per hire, if a 100 person call center has a 20% annual turnover rate, it results in $300,000 per year in direct costs. Cutting that rate in half would result in $150,000 savings annually.

5. General Description

Working with Human Resources, explore a call center career ladder that is tied to attributes such as individual agent metrics (ability to demonstrate proficiency); attendance and timeliness (reliability); participation in committees, projects, team activities (leadership); caller satisfaction scores (customer service).

Develop job descriptions for several job levels that can be achieved by performing at/above defined standards for each level.

Develop a template for individual development (IDP) that includes:

-Educational opportunities such as workshops or classes

-The ability to work with a mentor to assist with exposure to other opportunities within the department

-A clearly defined set of metrics and what must be achieved

-Coaching and training on new skills

The IDP should be refreshed at least annually and monitored for progress quarterly.

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6. Owner

Directly, call center leaders will own the career development and IDP process. However, statewide or departmental leaders will need to determine:

-Feasibility of a career ladder (such as call center rep I or II; lead rep, etc.)

-Reward/recognitions for "above & beyond" agent work

-Professional development opportunities to support individual development plans

7. Other Key Success Factors

-Infrastructure to support the individual development plan (IDP) and professional development.

-Defined metrics & goals for retention.

8. Previous example of impact

N/A

9. Initiative scoring

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)		Pilot (1-2)	
Familiar/Unfamiliar (3-4)	x	Small (3-4)	
Unfamiliar (5-6)		Medium (5-6)	
Unfamiliar/Uncertain (7-8)		Large (7-8)	x
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	
Quick Wins (1)		Customer experience	
Near-Term (2)		Operational efficiency	
Mid-Term (3)	x	Team member experience	x
Long-Term (4)			

10. Top 3 metrics

1. Turnover/retention rate
2. Employee engagement/satisfaction (based on pulse surveys)
3. Improved handle time (staffing stability should result in better metrics)

11. Please list other reference material

https://sharpencx.com/blog/what-is-the-cost-of-employee-turnover/

Task Force for Call Center Transformation

Call center career mapping Business Case – Theme # IPP: 1

1. Project Problem Statement

There is currently not a defined career road map for front-line customer service representatives.

2. Business Need

Without an outlined career roadmap many applicants are left unsure about their growth, development and career advancement. This ambiguity can hinder recruitment efforts as well as the retention of the current staff, especially top performers. It can also decrease employee engagement and quality of service.

3. Project Impact

Increase in employee engagement and discretionary effort. Reduction in attrition and absenteeism. Cost savings to recruit, hire and train new personnel.

4. Return on Investment (ROI)

Decrease recruitment and hiring costs due to reduced turnover and absenteeism. Increase in employee engagement and discretionary effort. Increase in the quality of service given to citizens and improved service levels.

5. General Description

For cost savings a career road map solution/plan can be created and initiated 'in-house' Directors, Managers and Supervisors will be the key stakeholders and should have full control of what it looks like. The entire process should be evaluated including but not limited to: testing, interviewing, on-boarding, new hire training, nesting, development, advancement (i.e., career mapping).

6. Owner

Owners:

- Directors, Managers, Supervisors from all departments. ***input from front line representatives is also critical. It's possible to have different roadmaps depending on the department.

Skill sets:

- Experience with growth and advancement in and from their own careers
- Leadership
- Ownership
- Adaptability
- Initiative
- Teamwork
- Interdepartmental communication skills
- Empathy

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7. Other Key Success Factors

For successful career mapping other initiatives such as recruitment, interviewing, on-boarding, training, call quality and key performance metrics should be established. Employees should have clear expectations of what is expected from them.

Additional resources may be required from online sources as well as assistance from Human Resources, Labor Relations (if unions are in place), Corporate Compliance and Corporate Communications.

8. Previous example of impact

Cox Communications Customer Care, circa 2006.

Implemented a career path program for CSRs called 'Circle of Success'. Circle of Success is a career path model based on specific performance metrics and role competencies.

See screenshot below.

The departments that implemented this plan saw almost an immediate uptick in employee attendance, performance and engagement. The costs are unknown but there are other ways to reward employees without a salary increase. It's going to take some creativity.
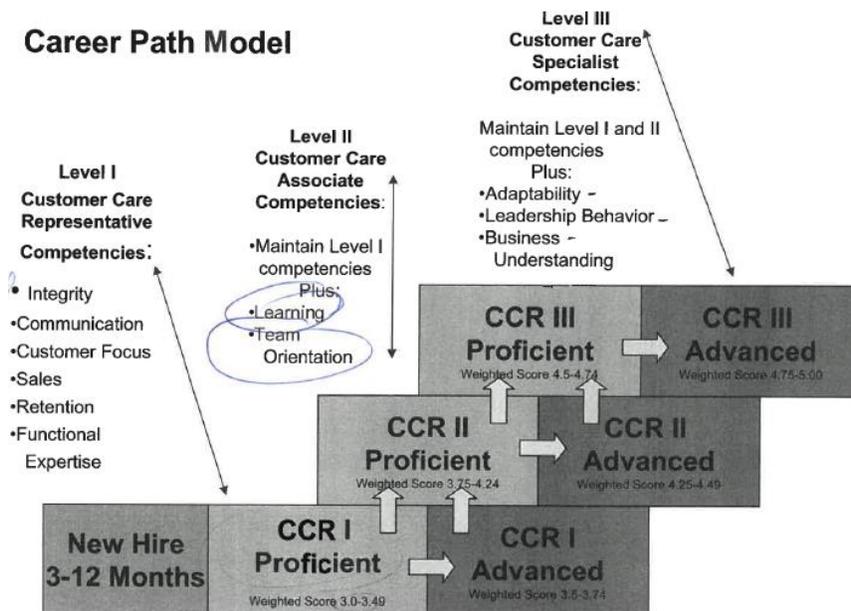
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Current Level (must remain in current level for at least 6 months)****	Next Level/Category	Required Metrics	Required Competencies	Potential Hourly Pay Increase
New Hire (3-12 months)	CCR I Proficient	Weighted Score of 3.00 – 3.49	Level I Competencies**	Varies*
CCR I Proficient	CCR I Advanced	Weighted Score of 3.5 – 3.74	Level I Competencies	3%
CCR I Proficient	CCR II Proficient	Weighted Score of 3.75 – 4.24	Level I Competencies, plus Learning and Team Orientation***	5%
CCR I Advanced	CCR II Proficient	Weighted Score of 3.75 – 4.24	Level I Competencies, plus Learning and Team Orientation	2%
CCR II Proficient	CCR II Advanced	Weighted Score of 4.25 – 4.49	Level I Competencies, plus Learning and Team Orientation	3%
CCR II Proficient	CCR III Proficient	Weighted Score of 4.5 – 4.74	Level I and II Competencies, plus Leadership Behavior, Business Understanding, and Adaptability***	5%
CCR II Advanced	CCR III Proficient	Weighted Score of 4.5 – 4.74	Level I and II Competencies, plus Leadership Behavior, Business Understanding, and Adaptability	2%
CCR III Proficient	CCR III Advanced	Weighted Score of 4.75 – 5.0	Level I and II Competencies, plus Leadership Behavior, Business Understanding, and Adaptability	3%

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9. **Initiative scoring**

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)		Pilot (1-2)	
Familiar/Unfamiliar (3-4)		Small (3-4)	
Unfamiliar (5-6)	X	Medium (5-6)	X
Unfamiliar/Uncertain (7-8)		Large (7-8)	
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	
Quick Wins (1)		Customer experience	
Near-Term (2)		Operational efficiency	
Mid-Term (3)	X	Team member experience	X
Long-Term (4)			

10. **Top 3 metrics**

   1. Top Performer Retention

   2. Absenteeism

   3. Employee Engagement (in-house survey such as surveymonkey.com or Gallup Q12)

11. **Please list other reference material**

Cox Communications Customer Care. 5 Bold Steps. Your Future – Your Move.

Lead, Commit, Score, Innovate, Deliver

www.ziprecuiter.com

Task Force for Call Center Transformation

Standardized call center training curriculum Business Case – Theme # IPP: 2

1. **Project Problem Statement**

When new call center reps are onboarded, they often do not all receive the same training, resulting in subpar performance.

2. **Business Need**

When call center agents are onboarded, they need to be given all of the tools they need to succeed. Currently, in an effort to get agents to go live more quickly, training managers are sometimes asked to provide a condensed training curriculum. This leads to the agent not having all knowledge needed to properly take care of customers, and they experience increased stress levels due to not feeling adequately prepared to perform their duties. This has resulted in at least one employee departing the company shortly after (or during) their expedited training.

3. **Project Impact**
   A. Customer Service Skills

   During new hire training, agents learn a wide variety of customer service skills throughout the full training program. By only giving agents training on a limited skill set (i.e. phone system navigation, product knowledge, company overview, quality monitoring overview; all other modules excluded), agents gain a base level of knowledge on a limited number of processes, but usually cannot excel at them.

   B. Agent Versatility

   By only training agents on an extremely small amount of phone lines, they are unable to assist the team with reducing the queue when calls are holding on lines they are not trained on. This can create situations late in the business day where the minimally-trained agents are sitting around waiting for calls while other agents are on back to back calls and calls are holding in the queue.

   C. Customer Satisfaction Scores

   When agents receive a condensed new hire training curriculum, they are released to begin interacting with consumers with some pretty wide knowledge gaps in the areas of process/product knowledge and customer service skills. This leads to increased customer dissatisfaction, and this shows in those agents' CSAT scores.

   D. Quality Monitoring Scores

   When agents receive a condensed new hire training curriculum, the knowledge gaps that they take with them post-training result in sub-par customer interactions which are reflected in their traditionally lower quality monitoring scores (as compared to agents that receive the full new hire training curriculum).

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E. Positive Self-Belief to Deliver Quality
   One of the key tenets of possessing a "service mindset" is to have a positive self-belief to deliver quality. If an agent does not feel empowered with the adequate amount of training/preparation, they tend to output subpar results and occasionally depart the company as a result.

4. **Return on Investment (ROI)**

Taking the time to properly train a call center agent costs money. If an agent does not receive the proper training, they become a relatively non-valuable resource that is being compensated at the same rate as a fully trained agent, and/or they occasionally depart the company prematurely (thereby wasting the money spent training them).

- Cost of Training Manager compensation per hour of training: $X
- Cost of agent compensation per hour of training: $X
- Cost of staffing additional agents per hour due to inadequate agent skills: $X

5. **General Description**

The training manager for a call center team should put together a comprehensive training curriculum for all new call center agents to undergo when joining the team. When given the time to go through the entire program, most agents can deliver excellent customer service, manage difficult customers effectively, and ultimately- increase company profits. Occasionally, in order to expedite the training process, the training manager might be asked to provide a condensed training program. This leads to subpar results. The training manager should strive to have the full, standardized curriculum to be delivered to all new hires.

6. **Owner**

Owner skill set:
- Subject Matter Expert to train new employees and guide OJT process
- Goal oriented
- People management
- Public speaking
- Effective communication

Owners of the project are:

- Training Manager
- Call Center Managers

7. **Other Key Success Factors**
- Full allotment of time for new hire training set aside for all new hires
- New hires to be hired on in groups, not individually or staggered over weeks
- Expected availability to work communicated to all new hires
- Coordination with HR team on first-day onboarding processes and expectations
- IT team to provide timely delivery of system accesses
- OJT trainers effectively preparing new hires to go live by providing abundant feedback on early calls and ensuring maximum amount of hands-on practice

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8.   Previous example of impact

N/A

9.   Initiative scoring

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)	X	Pilot (1-2)	X
Familiar/Unfamiliar (3-4)		Small (3-4)	
Unfamiliar (5-6)		Medium (5-6)	
Unfamiliar/Uncertain (7-8)		Large (7-8)	
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	
Quick Wins (1)	X	Customer experience	
Near-Term (2)		Operational efficiency	
Mid-Term (3)		Team member experience	X
Long-Term (4)			

10.   Top 3 metrics

     1. Agent CSAT scores

     2. Agent quality monitoring scores

     3. Agent retention rate

11.   Please list other reference material

N/A

Task Force for Call Center Transformation

Standardized call center training curriculum Business Case – Theme #IPP: 2

1. Project Problem Statement

New employees are receiving different training and onboarding experiences based on the location and department they are assigned to.

2. Business Need

Standardizing the training curriculum across state call centers will improve proficiency, accelerate training, reduce turnover and improve the employee experience.

3. Project Impact

Standardizing training can consolidate efforts of trainers and administrators across the state. By standardizing certain training aspects, this will allow training resources to be shared and utilized more efficiently. This will help build and maintain a positive working environment that will attract, retain new and existing staff.

4. Return on Investment (ROI)

Standardizing the curriculum will provide the opportunity to allow trainers to "float" from one center to another. This will help reduce the cost associated with designated trainers or "other" time from administrative staff and other employees.

5. General Description

For all new hires, each department prepares a training curriculum that shares many of the same characteristics of other departments. Only specialized and technical training aspects differ across call centers. Other characteristics remain similar or inherent to working for the State of Missouri and the various support service call centers. These may include:

- State of Missouri Services Overview / Introduction
- Employee Onboarding (Employee handbook)
- Support Services Overview (how, why, who, when we support citizens)
- Customer interfaces – Web, IVR, phone channels
- Policy and Procedures (Statewide, Division, Department)
- System Training
- Communication Skills (call scripting, soft skills training)
- Quality Assurance and CX Expectations
- Performance Management / Expectations

Creating standard documentation and practices around each aspect of training will help drive consistency and efficiency across new-hire training sessions regardless of where the training is held. These shared modules can be facilitated by various trainers regardless of their designated department - in-person or online.

Documenting the training process will allow for consistency and clarity on important employee and client related topics. It is important to ensure the consistent and accurate dissemination of information for both citizens and employees alike to reduce errors, improve efficiency and improve the overall experience.

Task Force for Call Center Transformation

6. Owner

Owners of the Project should be:

- Department Director - Enterprise
- Division Directors - Department
- Training Managers – Enterprise / Department
- Human Resources - Statewide
- Department Trainers

Skills Needed:

- Strong communication skills
- Technical writing
- Experience with SharePoint or other knowledge base or content management software
- Call Center
- Systems/IT

Background Suggested:

- Call Center
- Human Resources
- IT Process Documentation
- Customer Experience

7. Other Key Success Factors

Other success factors include:

- Reduced duplication of effort between departments
- Ensure policies and procedures are current and accurate
- Reduced new-hire training time
- Improved customer experience
- Improved employee satisfaction due to organized knowledge base materials

8. Previous example of impact

N/A

Task Force for Call Center Transformation

9. Initiative scoring

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)		Pilot (1-2)	
Familiar/Unfamiliar (3-4)	X	Small (3-4)	X
Unfamiliar (5-6)		Medium (5-6)	
Unfamiliar/Uncertain (7-8)		Large (7-8)	
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	
Quick Wins (1)		Customer experience	X
Near-Term (2)	X	Operational efficiency	X
Mid-Term (3)		Team member experience	X
Long-Term (4)			

10. Top 3 metrics

1. 0-12-month turnover performance

2. Customer Survey results

3. Improved AHT

11. Please list other reference material

N/A

Task Force for Call Center Transformation

<u>Standard front-line operational excellence best practices in call centers Business Case – Theme #IPP: 3</u>

1. **Project Problem Statement**

   If call center staff do not know the key metrics for their call center, they may not understand the goals and strategies for their work. Leaders may not have visibility into areas of concern.

2. **Business Need**

   Improvement in any area cannot be achieved unless performance is measured and tracked over time. Only by consistent measurement of relevant, actionable data can leaders know how to prioritize improvement efforts. Further, staff must know how they are performing, both individually and as a team, to improve and achieve goals.

3. **Project Impact**

   By understanding performance, having actionable data, and celebrating success when metrics are achieved, staff will be more engaged and motivated to achieve results.

4. **Return on Investment (ROI)**

   Visibility of key metrics and goals will improve awareness of performance and motivation for improvement. This will result in better caller experience, lower abandonment rates, and better speed of answer. Having easy to access dashboards will also make it more efficient for management to consistently convey priorities and metrics to all staff.

5. **General Description**

   Develop a dashboard to include key metrics. This can be an actual whiteboard, or can be done in a virtual manner. An example is below. Combining the dashboard with a daily huddle structure to review staffing, important announcements, and reward & recognition will make it even more effective.

6. **Owner**

   High level goals may be established statewide. Example: we will answer xx% of our citizen calls within x minutes. Goals and metrics specific to a department/division should be established by local leadership. Obtaining front line staff participation in the development of the metric dashboard is vital.

7. **Other Key Success Factors**

   Once the dashboard is established, keeping it fresh and updated is key to its success. There must be ownership to ensure it will remain useful to the staff.

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8. Previous example of impact

The dashboard used by the clinical and non-clinical patient triage service at St. Louis Children's Hospital was developed in a 2 day workshop and implemented within several days. It has been a sustainable (3+ years) model for sharing key information with staff across all shifts (24 x 7) and with a mostly remote workforce. It takes a leader less than 30 minutes daily to update the dashboard with pertinent information and updated metrics. Staff have expressed their satisfaction with this communication tool and view it regularly.

9. Initiative scoring

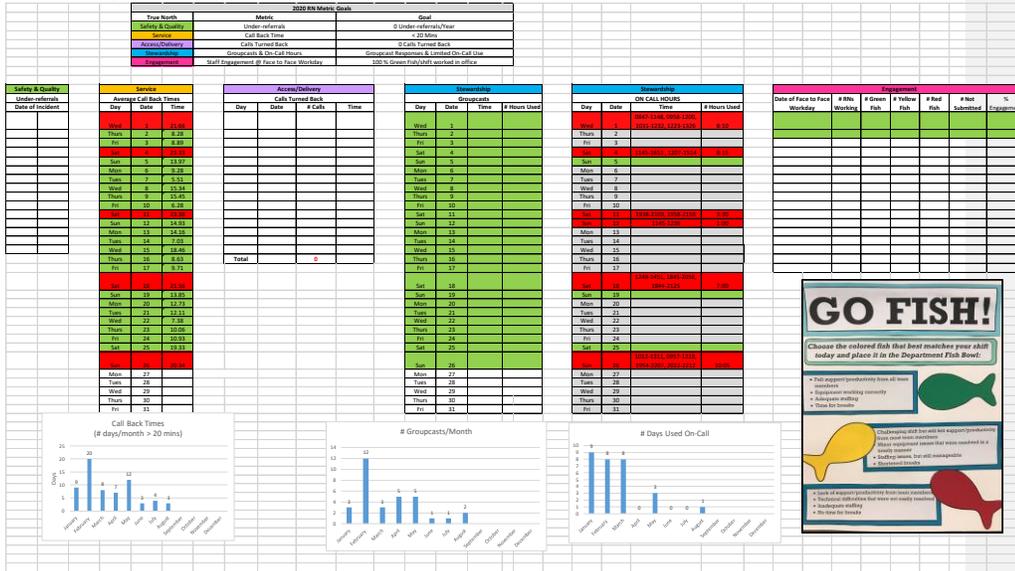| Familiarity (1-10)		Scale of Impact	
Familiar (1-2)	x	Pilot (1-2)	
Familiar/Unfamiliar (3-4)		Small (3-4)	
Unfamiliar (5-6)		Medium (5-6)	
Unfamiliar/Uncertain (7-8)		Large (7-8)	x
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	
Quick Wins (1)	x	Customer experience	
Near-Term (2)		Operational efficiency	x
Mid-Term (3)		Team member experience	
Long-Term (4)			

10. Top 3 metrics

1. Abandonment rate

2. Average speed of answer

3. Call handle time

11. Please list other reference material

N/A

Task Force for Call Center Transformation

Example of "virtual dashboard" at BJC:

	2020 RN Metric Goals	
True North	Metric	Goal
Safety & Quality	Under-referrals	0 Under-referrals/Year
Service	Call Back Time	< 20 Mins
Access/Delivery	Calls Turned Back	0 Calls Turned Back
Stewardship	Groupcasts & On-Call Hours	Groupcast Responses & Limited On-Call Use
Engagement	Staff Engagement @ Face to Face Workday	100 % Green Fish/shift worked in office

Safety & Quality — Under-referrals — Date of Incident

Service — Average Call Back Times

Day	Date	Time
Wed	1	21.80
Thurs	2	8.28
Fri	3	8.89
Sat	4	23.33
Sun	5	13.97
Mon	6	9.28
Tues	7	5.51
Wed	8	15.34
Thurs	9	15.45
Fri	10	6.28
Sat	11	23.99
Sun	12	14.91
Mon	13	14.16
Tues	14	7.03
Wed	15	18.46
Thurs	16	8.63
Fri	17	9.71
Sat	18	20.98
Sun	19	13.85
Mon	20	12.73
Tues	21	12.11
Wed	22	7.38
Thurs	23	10.06
Fri	24	10.93
Sat	25	19.33
Sun	26	20.14
Mon	27	
Tues	28	
Wed	29	
Thurs	30	
Fri	31	

Access/Delivery — Calls Turned Back

Day	Date	# Calls	Time
Total		0	

Stewardship — Groupcasts

Day	Date	Time	# Hours Used
Wed	1		
Thurs	2		
Fri	3		
Sat	4		
Sun	5		
Mon	6		
Tues	7		
Wed	8		
Thurs	9		
Fri	10		
Sat	11		
Sun	12		
Mon	13		
Tues	14		
Wed	15		
Thurs	16		
Fri	17		
Sat	18		
Sun	19		
Mon	20		
Tues	21		
Wed	22		
Thurs	23		
Fri	24		
Sat	25		
Sun	26		
Mon	27		
Tues	28		
Wed	29		
Thurs	30		
Fri	31		

Stewardship — ON CALL HOURS

Day	Date	Time	# Hours Used
Wed	1	0847-1140, 0956-1200, 1091-1232, 1223-1326	8:30
Thurs	2		
Fri	3		
Sat	4	1145-5052, 1700-7514	8:15
Sun	5		
Mon	6		
Tues	7		
Wed	8		
Thurs	9		
Fri	10		
Sat	11	1816-7601, 1938-6158	8:30
Sun	12	1141-1288	1:00
Mon	13		
Tues	14		
Wed	15		
Thurs	16		
Fri	17		
Sat	18	1248-1451, 1645-3056, 1844-7535	7:00
Sun	19		
Mon	20		
Tues	21		
Wed	22		
Thurs	23		
Fri	24		
Sat	25		
Sun	26	1212-1313, 0957-1315, 1854-2207, 7021-2212	100%
Mon	27		
Tues	28		
Wed	29		
Thurs	30		
Fri	31		

Engagement

Date of Face to Face Workday	# RNs Working	# Green Fish	# Yellow Fish	# Red Fish	# Not Submitted	% Engagement

Call Back Times (# days/month > 20 mins)

Groupcasts/Month

Days Used On-Call

GO FISH!

Choose the colored fish that best matches your shift today and place it in the Department Fish Bowl!

Task Force for Call Center Transformation

Call center recruitment strategy Business Case – Theme #: IPP: 4

Project Problem Statement

By creating a specific State of Missouri call center recruitment strategy, we will primarily improve operational efficiencies – while also improving the agent experience, resulting in reduced agent attrition.

1. Business Need

The primary impact of a recruitment strategy will be improved operational efficiencies, with a secondary impact on agent experience. The benefits/needs of each of these impacts include, but are not limited to:

Improved Operational Efficiencies:

- Staffing Needs – ability to staff appropriately to handle volumes
- Customer Experience – with staffing levels corrected, customers have less wait time to get their calls answered
- Answer Rate/Abandon Rates – with less wait time to get an agent, citizens calls will be answered in a reasonable amount of time – resulting in few abandons and repeat calls
- Overtime – Once calls can be answered appropriately, any needs for costly overtime is reduced

Improved Agent Experience:

- Agent Experience – Reduced overtime and constant busy conditions will reduce agent stress and improve the overall agent experience
- Agent Attrition – Removing excessive overtime and the customer stressors above will reduce agent fatigue and attrition
- Hiring/Training Costs – reducing the fatigue and attrition results in eliminating the need to be in constant hiring/training mode – removing high cost agent acquisition efforts

2. Project Impact

See #2 (Business Needs) for more detail

- Improved Staffing Levels
- Improved Customer Experience
- Improved Agent Experience
- Reduced Agent Fatigue/Attrition

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3. **Return on Investment (ROI)**

<u>Direct Savings:</u>

A recent study by the Society of Human Resource Management stated the average cost to hire an employee in 2019 was $4129, taking an average of 42 days to fill a position.

This number increases when you're replacing employees, rather than hiring new. A study by the same organization showed that agent turnover can cost between 90%-200% of the employee's salary to replace them.

When considering a tailored recruitment and retention strategy, this cost per hire metric can easily be calculated.

<u>High Quality Customer Service and Hours Saved:</u>

There are multiple customer service benefits, as well as potential hours saved – outlined above. These benefits include:

- Improved Staffing Levels
- Improved Customer Experience
- Improved Agent Experience
- Reduced Agent Fatigue/Attrition

4. **General Description**
- By building a tailored recruitment and retention strategy, the call centers can expect better quality hires – resulting in less agent attrition
- Better quality hires and less turnover will result in:
    - Increased operational efficiencies
    - Increased agent experience

5. **Owner**

Owners of the Project should be:

- Human Resources/Staffing/Recruitment Team
- Department Director
- Division Directors
- Workforce Management Team
- Communication and Website Liaison

Skills Needed:

- Business Analytics
- Customer/Agent Journey Mapping Subject Matter Expert (Internal or External Sources)
- Project Management
- Call Center

Task Force for Call Center Transformation

Background Suggested:

- HR/Staffing
- Call Center
- Workforce Management
- Customer Experience
- Agent Experience

6. Other Key Success Factors

Additional success factors include fully understanding:

- Where the premium talent acquisition spaces are located
  - Virtual
  - Recruitment Events
  - Existing External Call Center Opportunity
- How to attract the right employee for the job
  - What screening criteria are most important for this type of work?
- Tendencies of call center workers by generation
  - How do Gen X employees differ than Gen Z, etc.?
- Why do agents leave a call center job?
  - By design – career advancement
  - Burnout
  - Pay

7. Previous example of impact

N/A

8. Initiative scoring

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)		Pilot (1-2)	
Familiar/Unfamiliar (3-4)		Small (3-4)	
Unfamiliar (5-6)		Medium (5-6)	
Unfamiliar/Uncertain (7-8)	X	Large (7-8)	X
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	
Quick Wins (1)		Customer experience	X
Near-Term (2)		Operational efficiency	X
Mid-Term (3)	X	Team member experience	X
Long-Term (4)			

Task Force for Call Center Transformation

9. Top 3 metrics

I think it is important to note that a recruitment strategy is only as good as the retention strategy that compliments it.   These are not two different strategies – they must be looked at together to determine the success of the initiative.

The initiative was defined as having a primary objective of improving Operational Efficiencies, with a secondary goal of reducing the Agent Experience. The top 3 metrics for each of these goals should be:

Operational Efficiencies:

- Accessibility – Measures staffing level success based on:
    - Projected call volumes
    - Projected Average Handle Time (AHT)
    - Time in queue before speaking to an Agent
- Voice of Customer – Measures customer satisfaction based on:
    - The most recent agent interaction
- Answer Rate/Abandon Rate – Measures the ability to answer customer calls
    - Measure by hour/day/week/month
    - Number of calls offered
    - Number of calls answered
    - Number of calls abandoned

Agent Experience:

- Net Promotor Score – Measures agent satisfaction based on survey questions on an annual or bi-annual basis
- Agent Attrition – Measures agent attrition in each line of business broken down by:
    - New Hires Attrition
        - During training
        - After training
            - 1 month
            - 3 months
            - 6 months
    - Existing Agent Attrition
        - By tenure (years of service)
- Cost/Hire -Measures annual new hire cost by line of business

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Introducing more citizen-centric design – including mapping customer experience journeys

Citizen focused call centers Business Case – Theme #CC: 1

1. Project Problem Statement

Call centers that are perceived to be difficult to navigate or that provide poor service reflect badly on the State of MO and are not delivering on the State's commitments to its citizens.

2. Business Need

By designing call center operations around the needs of the customer/citizen, satisfaction will increase, repeat calls will likely decrease, and staff will be more engaged and satisfied because they are empowered to meet the citizen's needs.

3. Project Impact

Staff satisfaction will increase if they feel less stressed about incoming call volume. Adopting a home agent model can result in higher employee engagement and better productivity.

2. Return on Investment (ROI)

Depending on the call center, significant savings can be achieved by techniques such as extended hours to level out call volume (better services levels without adding staff). Training and empowering call center staff to problem-solve for citizens AND providing them with all of the information they need will result in better first call resolution, shorter call times, and less hold time. Again, these efforts can mean better service levels without adding staff.

Home agents can save tangible dollars in office space and real estate. At BJC, it was estimated the cost of a cubicle for an agent is approximately $10,000 annually. Conversely, the one-time cost to set up a home agent is less than $2,000 and ongoing expenses less than $1,000 per year.

3. General Description

Customer service and managing difficult caller training
Modify hours of operation
Seasonal staffing model; incentives to work more hours during peak months vs. light schedule off-peak months (if volume indicates this would help)
Minimize auto-attendant feature
Empower and train call center staff to problem-solve for citizens
May consider deploying home agents and implementing an on-call system

4. Owner

Training for general topics should be standard across the state/enterprise.
Subject matter training should be owned by the department.
Changes in hours of operation should be call center specific based on call volume and citizen feedback.

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Creative staffing models such as short shifts, crossover shifts, home agents, etc. should be department based decisions.

5. Other Key Success Factors

Must get staff input to help with acceptance of change.

Hours/shift changes need to be backed by data demonstrating demand (or lack of) by time of day/day of week.

Seasonal staffing, home agents, etc. require HR input for benefits and management consistency.

6. Previous example of impact

BJC HealthCare operates call centers covering a wide range. From 24x7 clinical call centers to Mon-Fri non-clinical "business" call centers, there are multiple models and lessons learned over the years.

The Mon-Fri business call centers typically utilize traditional 8 hour workdays, but some have overlapping shifts, short shifts to cover peak times, off-peak breaks/lunch, etc.

The clinical call centers have more complex overlapping shifts that may vary by day of week. There are also shifts covered by on-call staff.

By adapting a mostly remote workforce (home agents), each call center has more flexibility & creativity to cover the call volume. Home agents have been found to be more productive than staff working in the office. Working remotely has also proven to be a good employee engagement tactic.

7. Initiative scoring

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)		Pilot (1-2)	
Familiar/Unfamiliar (3-4)		Small (3-4)	
Unfamiliar (5-6)	x	Medium (5-6)	
Unfamiliar/Uncertain (7-8)		Large (7-8)	x
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	
Quick Wins (1)		Customer experience	x
Near-Term (2)		Operational efficiency	
Mid-Term (3)	x	Team member experience	
Long-Term (4)			

8. Top 3 metrics

1. Caller/Citizen satisfaction

2. First call resolution

3. Average speed of Answer

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9.   Please list other reference material
N/A

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Mobile apps Business Case – Theme #CC: 2

1. Project Problem Statement

Use of a mobile application will significantly reduce call center volumes and wait times while providing an improved residents experience. This capability will enhance the State's ability to service their residents' requests through timely and frictionless experiences to allow immediate and direct visibility into their information. Example: "Do as much as I can w/o talking to a person (= lots of time & handoffs & re-telling my story)".

2. Business Need

Of the 8 million calls that come into the states call centers, half of them are simple questions. These questions are simply the residents looking for updates on work that the State has inflight for a them. If the State invests and develops a mobile application, the residents of Missouri could look at the status of their cases without having to interact with the State's call centers, thus saving call centers time and money, and allow the call centers to have more time to process cases.

3. Project Impact

    a. Improved Resident experience
        i. Residents will now have access to check their applications with the State using a secure platform that will ensure the residents' private information is safe.
    b. Reduce State employee's workload.
        i. Use of the mobile application will remove repetitive and low impact work from the State employee's workflow. This will allow the State employees to focus on work that has a greater impact to the residents of Missouri.
    c. 24/7/365 Resident Access
        i. Using a mobile application will give the residents of Missouri 24/7/365 access to their information when they want to access it in or outside of call center hours of operation.
    d. Improved feedback from residents
        i. Using a mobile application will allow the State to get feedback from residents on the business processes that are deployed in the application. The State can ask for feedback in the application to understand how the mobile application is meeting the residents' needs.

4. Return on Investment (ROI)

- Reduced number of calls to the call centers allows the actual call centers to produce better results for the citizens they are helping via the phone
- Reduced number of call center attendants allows more detailed efforts on solving challenges for the citizens
- Provide less wait time for users dialing into the call centers, make the shift from a live to a self-service function
- Provides a delightful citizen experience that is frictionless providing the citizen the right data, at the right time.

Hard Cost Savings Estimate:

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Calls Avoided Due to Mobile Application	Average Cost Per Min	Average Time Per Caller	Total Savings to the State of Missouri
2,000,000 (25%)	$1.00	10 minutes	$20,000,000
3,000,000 (37.5%)	$1.00	10 minutes	$30,000,000
4,000,000 (50%)	$1.00	10 minutes	$40,000,000

5. **General Description**

There are many ways to solve this challenge. Starting with a stakeholder and state leadership team to collaborate on what good looks like for this opportunity will help guide the actual outcome and process. It might also be helpful to survey a resident focus group to garner insights from actual users as well. Once the desired outcome is defined then start to evaluate what technology solution is the best. Always start with the business need and then work to find the right technology and any lessons learned.

6. **Owner**

Find the innovating champions – The sponsor who understands strategy and is influential in the state organization will know best how to navigate across the state organization. Once you have identified the champion, then stakeholders need to be identified from each department or call center team and work collaboratively to ensure that the state/enterprise is managing and deploying a single solution as a statewide solution. This will keep the initiative on track and users across the state will have a consistent resident experience regardless of location or call center. This will also save time and money for the state as governance and management of the solution are put into place.

7. **Other Key Success Factors**
   - Keep it simple, make sure the app does something truly useful
   - Make sure the app is compatible with your existing back-end processes, or the cost and time of development could skyrocket.
   - Key stakeholder involvement is especially important when creating a governance structure for mobile apps.
   - Partner with a developer that knows the ins and outs of the different mobile platforms as the behaviors and maintenance will vary
   - Make the shift from a live to a self-service-dominant function

8. **Previous example of impact**
   Example #1:

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Fast casual restaurants have strong competition for customers' attention with the advent of on-demand delivery, the speed of Amazon, and third-party ordering. To combat these elements, Jersey Mike' had to create an app that meets customers at their mindset, providing sustenance and substance.

CHALLENGE

Be customers' first choice amongst their competition

Jersey Mike's goal was to create an experience that embodied their culture and Jersey Mike's knew that they needed to meet their customers at their mindset. Whether it was grab and go, stay and savor, or catering, they wanted an experience that is frictionless, fast, and anywhere or anytime to meet the evolving needs of their customer and sell more subs.

SOLUTIONS:

ORDER AHEAD

Pick up and delivery all in the app

Schedule an order for pickup or delivery through the app to get your favorite Sub even on the busiest of lunch hours.

REWARDS

Earn Shore Points® on every purchase

With every Sub purchase you make, you'll earn points toward a free Sub of your choice. Redeem online or in-store.

FAVORITES

Your Sub your way, one tap away

With your MyMike's™ account not only do you earn Shore Points with every order but your favorites are just one tap away.

OUTCOMES

Crafting an experience that reinvents the corner deli

With five months and over one million orders, Jersey Mike's is owning their customer journey. The new mobile app brings the branded charm of Jersey Mike's Jersey Shore roots, surprise and delight with rewards, and gets to know the customer, so at its core revolves around their user's needs. As it grows, the app will continue to remove friction, improve upon its usability with new features, to keep customers coming back for A Sub Above.

"This app flys…More importantly, I was able to find, customize, and order my go-to sandwich in just another 30 seconds…"

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- iOS APP STORE REVIEW

Example #2

CHALLENGE

Schnucks' greatest competition is their customer's time

As delivery apps, restaurants and grocery chains compete for their customers' attention, Schnucks needed to craft a mobile experience that would help their customers save time and money. To drive strong engagement, topped with a layer of customer delight, the mobile app focuses each detail around making the customer experience frictionless and rewarding.

"As our **consumers have changed**, as **our company has changed**, we needed to make sure our **mission of nourishing people's lives has evolved.**"

- **TED SCHNUCK**

SOLUTIONS

SAVINGS

Coupons at your finger tips

With over 100 new searchable coupons every week, the app provides exclusive savings that drive new and repeat in-store visits daily.

REWARDS

Save up to $500 for a future trip

Customers earn 10 Points for every $1 spent and at 1,000 Points they receive $2 to use immediately or save for their next shopping trip.

ORDER AHEAD

Deli, Floral, & Instacart

Reducing wait times in store, shoppers can order deli items, floral arrangements and cakes before they even enter the store… creating a more efficient

shopping experience.

WELLNESS

Focus search by dietary need

From heart smart to gluten free, wellness icons help customers create lists and shop for their family's dietary needs all within the app.

Rewarding customers for each visit & creating brand loyalty

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The 'Schnucks Rewards' mobile app not only exceeds customer expectations, but also drives incremental store visits, higher basket sizes, and new customer acquisition. In the first few weeks of launch, Schnucks nearly doubled the impression and engagement benchmarks they set in half the time. In current and future releases, the app will continue to remove known friction points and improve upon usability with new features and service customizations.

2X IMPRESSION AND ENGAGEMENT MODELS

900k LOYALTY MEMBERS

iOS TOP RANKED FREE APP

"…it's nice to get paid back for what I spend…the search feature helps me find any item in the store"

- IOS APP STORE REVIEW

9. **Initiative scoring**

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)	x	Pilot (1-2)	x
Familiar/Unfamiliar (3-4)		Small (3-4)	
Unfamiliar (5-6)		Medium (5-6)	
Unfamiliar/Uncertain (7-8)		Large (7-8)	
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	
Quick Wins (1)	x	Customer experience	x
Near-Term (2)		Operational efficiency	x
Mid-Term (3)		Team member experience	
Long-Term (4)			

10. **Top 3 metrics**
10. Reduced number of calls to call center and customer wait times
11. Number of app downloads, active users, session length
12. Time and cost savings for back office support

11. **Please list other reference material**
https://www.gartner.com/en/information-technology/trends/public-sector-technology-report-2018

https://www.gartner.com/en/documents/3978908

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Website re-design across the enterprise Business Case – Theme # CC: 3

1. Project Problem Statement

Adoption of self-service applications available on the State of Missouri's websites is low, driving volume to call centers.

2. Business Need

Self-service applications on the State of Missouri's websites are, presently, underutilized. Citizens should be more readily able to locate and access the tools, utilities, and education made available to them. Clarifying website layout design and updating it to reflect the ever-evolving best practices of the Internet would be a very strong step towards improving asset engagement.

Increasing the number of citizens who use self-service options available on the State's websites will ultimately reduce the number of calls that are made to the State's call centers.

3. Project Impact

Updating the websites of the State's various agencies, and improving access to its various utilities, will provide many benefits.

A. Increased Web Traffic
   Citizens who start using self-service options on the State's websites will be more likely to find other resources that are available online. If citizens can find what they need on the State's websites, they will become accustomed to using them as a first option.

B. Reduced Call Center Load
   Preventing or deflecting callers by making them aware of self-service options will decrease the number of calls that State call centers must handle. This will bring the State closer to being able to answer 100% of calls.

C. Increased Citizen Services
   Providing more self-service options and educating Missouri's citizens on existing self-service applications will make it easier for citizens who do not want to interact over phone or mail to communicate with the State.

D. Citizen Insights
   Increasing the number of citizens who use self-service options allows the State to gain insights into other ways to improve the customer experience.

4. Return on Investment (ROI)

In surveys of citizens from Australia, France, Germany, Singapore, the United Kingdom, and the United States, 86% of people view digital delivery of public services as equally or more important than traditional methods, such as phone calls and mail, including 50% of respondents who support the use of advanced technologies such as AI. However, over 30% of citizens don't use or don't know how to access digital self-service options available through the government.

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Between CY18 and CY19, the State's relative volume of calls handled remained mostly level – increasing by 0.2%, from 2,941,114 to 2,948,383 (+7,269 calls). In the same period, the number of abandoned calls increased nearly 40%, from 766,544 to 1,068,568 (+302,024 calls). This seems to suggest that, while the State's capacity to handle incoming calls has improved slightly, the demand for their services has far outpaced relative supply.

Assuming a total call volume of 4,000,000 calls per year, a reduction of 30% of the state's total call volume due to digital services would remove 1,200,000 calls each year. This leaves 2,800,000 calls for the State to handle, well within the State's demonstrated ability of handling ~2,945,000 calls per year and fulfilling the State's goal of answering 100% of calls.

5. General Description

Analyzing call center data and website analytics will reveal how many citizens currently leverage self-service options and help determine what new self-service applications can be developed to lighten the load on the State's call centers. Frequent call types can be analyzed to determine if self-service applications can be developed and common calls with existing self-service options can notify customers of their online availability. Website layouts will be assessed to bring focus to customer education and self-service.

6. Owner

Owner skill set:

- Project Management
- Call Center Subject Matter Expert
- Advanced Technology
- Business/Data Analytics
- Digital Marketing

Owners:

- Department Leads
- Information Technology
- Digital Transformation Team Lead
- Web and App Developers
- Customer/User Experience SMEs
- Call Center SMEs
- Data Analysts
- Digital Marketing SMEs

7. Other Key Success Factors

- Further initiatives with DORA Chatbot
- Experience with Business/Data Analytics and Advanced Technology
- Information Security infrastructure and skills
- Further initiatives with State of Missouri marketing self-service resources
- Interdependence with NLP, Chatbot, and Mobile App initiatives

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8. Previous example of impact

In 2016, Italy's fourth largest bank (UBI Bianco) overhauled their website, aiming to grow and engage with their customer base. Boosting traffic with SEO-friendly content, enhancing the user experience by analyzing customer response, and heavily optimizing the site itself, the bank's marketing was also improved upon. Utilizing these tools to better direct customers to their digital services, their organic traffic rose by nearly 25%, while their weekly hit average to their call back page rose by 214%. By taking a personalized approach, tailored to customer usage feedback, the website was able to massively boost customer engagement with the bank – working along similar lines, paying close attention to feedback and usage statistics would likely improve the visibility of and engagement with self-services and other digital utilities the State offers.

9. Initiative scoring

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)	X	Pilot (1-2)	
Familiar/Unfamiliar (3-4)		Small (3-4)	
Unfamiliar (5-6)		Medium (5-6)	
Unfamiliar/Uncertain (7-8)		Large (7-8)	X
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	
Quick Wins (1)		Customer experience	X
Near-Term (2)		Operational efficiency	
Mid-Term (3)	X	Team member experience	
Long-Term (4)			

10. Top 3 metrics

1. Self-Service User Count

2. Total Calls for tasks available via Self-Service

3. Webpage User Count

11. Please list other reference material

N/A

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Leveraging the potential of Advanced Technology – ranging from predictive analytics to enabling new service models (e.g., chat bots)

Shared knowledge management system Business Case – Theme # AT: 1

1. Project Problem Statement

Create a shared knowledge management system which can be used throughout the enterprise.

2. Business Need

The State of Missouri will have a shared database that allows call center agents the ability to access all information on a Citizen. This shared knowledge management system will allow different types of analytics to shape customer service and customer behavior.
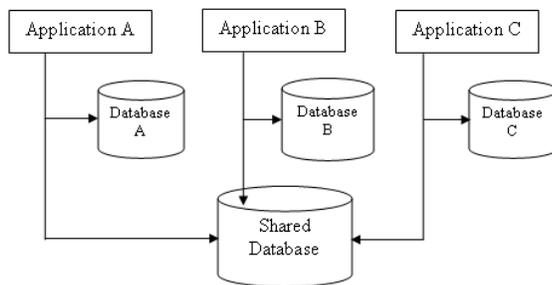

Figure 1: Shared Database

3. Project Impact

This project will have the following impact in the areas listed below:

- Improved citizen satisfaction by reducing the frequencies of contacts required
- Agents will be able to handle multiple Citizen inquires in a single contact, reducing call volume and improving employee moral
- Improve the revenue flow by informing and or collecting pending Citizen fees
- The Average Speed to Answer (ASA) decreases as agents will be trained and skilled to handle numerous call types

4. Return on Investment (ROI)

By implementing this plan, we expect to realize an overall savings of approximately 15-20% in operational efficiencies at the implementation of this project. Based on previous experience, by combining all queues within a department, the following benefits could be achieved:

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- A reduction in licenses due to combining call queues within the specific departments and expanding outside of their home department.
- The total number of inbound calls will be reduced by 20-30% by combining specific queues.
- First call resolution will improve. This would be validated by conducting a Post Call Survey.)
- Reduction in hours paid, to be determined based on the number of queues on which an agent can be trained.

5. **General Description**

With the use of a shared knowledge management system, the following three-step solution is recommended.

A. **Short Term: (0 to 6 Months)**

a. **FAQs**: The existing FAQs will be assessed for all individual call centers. The FAQs will be updated to include current information and will be simplified in a question and answer format.

b. **Focus Groups**: Create focus groups to identify knowledge management gaps. Focus groups will include a small, but demographically diverse group of call center agents. The feedback is analyzed specifically to identify knowledge management related gaps and opportunities for improvement.

c. **CRM Analysis**: The existing CRM database is analyzed to study customer behavior, prepare/update analytics, and address real time issues and challenges. The analysis may identify knowledge management gaps that lead to issues such as high call time, calls being rerouted to the queue, low first call resolution, etc.

B. **Medium Term (6 to 18 Months):**

a. **Centralized/Shared Knowledge Base**: Existing shared knowledge management tools/products to be leveraged in order to maintain an integrated, structured, and version controlled knowledge base, accessible appropriately to users. The following key roles are engaged:
   i. *Knowledge Management Champion:* Forms the knowledge management team, coordinates the related activities, and seeks input and feedback from agents.
   ii. *Subject Matter Experts:* Assigned to collect, update, and optimize knowledge artifacts, e.g., Best Practices, Standard Operating Procedures, Templates, Checklists, Scripts, Analytics, etc.) Artifacts will be version controlled.
   iii. *Infrastructure Assistant:* Ensures artifacts are accessible to users as required and appropriate access permissions are assigned. Availability, accessibility, maintenance, and performance of the knowledge base will be the responsibility of the Infrastructure team.

b. **Training and Quality Assurance:** Training sessions will be conducted to ensure agents understand the knowledge management system and processes.

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   c. **Long Term (18-30 Months**): Integration of the knowledge base with other
      applications:
      i. *Chat Bot:* The updated knowledge base will be integrated with Chat Bot. This
         will assist call center agents to provide the appropriate response on standard
         queries to the caller through the automated Chat Bot or other scripting tools.
      ii. *IVR:* Integration of the knowledge base with the IVR will help call center agents
         provide the appropriate responses and call routing.
      iii. *CRM:* The updated knowledge base will be integrated with CRM, which will
         help the agent get the appropriate information on demand and with minimal hold
         time for the agent and the caller.

Figure 2: Knowledge Management Organization

6. Owner

Knowledge Management is the responsibility of everyone in the call center and is owned at the call
center level.

The owner may be from one or more of the following roles:
- Call Center (Department) Director
- Operations Manager
- Team Leads
- Supervisors
- Call Center Agent

Owner's skill set:
- Knowledge management expert
- Experienced in digital learning
- Business analytics
- Strategic thinker
- Goal oriented

7. Other Key Success Factors
- Integration of the knowledge base with other call centers/departments

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- Uninterrupted availability and accessibility of the knowledge base during working hours
- Maximum participation from the staff of the knowledge management initiative
- Improved overall Citizen experience
- Improved call center staff skills

8. Previous Example of Impact

Example 1:

At AT&T, inbound agents had excessive idle time (40%) on a specific queue; the goal was to reduce their idle time by training them on additional call types that had higher wait times. The overall impact was idle time was reduced to 15% and the abandoned rate was reduced from 9% to 4% on the queues that the agents were cross-trained on. The negative impact was that the cross-trained agents felt they should be paid more since their skill level had increased.

Example 2:

At AT&T, inbound agents had excessive idle time of greater than 50%. With an upgrade to the Davox dialer, the agents were moved from a singular to a blended agent. During inbound idle time agents were automatically switched to making outbound calls. When the inbound volume increased, the agent would be moved back to their inbound status. The overall impact was a decrease in idle time to less than 10% and an increase in sales of 10%.

The challenge in the project was to appraise accurately the agents based on their production. The existing reporting structure did not support this split in work types. The negative impact was that the cross-trained agents felt they should be paid more since their skill level had increased.

Example 3:

At Heathway's, an internal transfer process was developed to transfer callers who had completed part of the initial contact to other employees. The results were as follows:

- Improved the closure rate from 30% to 70% due to the real time transfer
- Eliminated the need of a scheduled call back
- Improved caller satisfaction by having one contact point

9. Initiative Scoring

Attached is a sheet of the grading scale.

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)		Pilot (1-2)	
Familiar/Unfamiliar (3-4)	X	Small (3-4)	
Unfamiliar (5-6)		Medium (5-6)	
Unfamiliar/Uncertain (7-8)		Large (7-8)	X
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	

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Quick Wins (1)		Customer experience	
Near-Term (2)		Operational efficiency	X
Mid-Term (3)	X	Team member experience	
Long-Term (4)			

10. Top 3 Metrics

Tracking the following three key metrics regularly, (weekly/monthly) will help to determine success of this initiative over the period of time.

- Decrease in the number of inbound contacts
- Increase in First Call resolution
- Abandonment Rate reduction

11. Please list other reference material

N/A

Task Force for Call Center Transformation

First and second call resolution Business Case – Theme # AT: 2

1. Project Problem Statement

There is not a current process for tracking or measuring first/second call resolution.

2. Business Need

Centers are inundated with calls and wait times are high. A system or process to reduce call volume is needed to improve service levels, customer/citizen experience and lower operating costs. One way to improve this is to create a process to measure/improve first and second call resolution and identify why (root cause) citizens are repeated calling.

3. Project Impact

Resolving a citizen's issue or inquiry on a single contact would yield positive dividends. First/second call resolution is a key indicator of customer experience/satisfaction, efficiency and overall operational performance.

4. Return on Investment (ROI)
- Improve customer/citizen experience
  - Service Quality Measurement Group states a 1% improvement in FCR yields a 1% improvement in customer satisfaction
  - Customer Relationship Metrics found that "caller satisfaction ratings for the company in general and for the CSR will be 35-45% lower when a second call is made for the same issue"
- Increase opportunities to promote additional services
  - Such as self-service options (IVR, website, chatbot)
- Improve employee satisfaction
- Reduce wait times
- Reduce costs due to repeat calls
  Example: the average cost per call across the centers is $3.80 (based on the Chatbot case), potentially saving the following amounts per year:
  - 250,000 calls – $950,000
  - 500,000 calls – $1,900,000
  - 750,000 calls – $2,850,000

5. General Description
- Leadership solicits feedback from front-line employees and related departments regarding call types/issues, especially repeats.
- Increase Training and Cross Training with Quality Monitoring
- Add it to Quality Assurance evaluations (ask questions such as…)
  - Have I resolved the reason for your call today?
  - Is there anything else I can help you with?
  - Was your question or issue resolved today?
  - Have you had to call us about this before?

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- Track the full customer journey.
- Identify people, processes or technology that can be changed quickly.
- Implement a post call survey with up to 5 questions about their experience with an emphasis on whether the citizen felt the call was resolved with a positive outcome on the first attempt.
- Target by channel and by contact/issue type (e.g. dept of revenue, dept of labor, dept of social services) with effective sample sizes.
- Frequency on a monthly basis.
- Follow-up and provide feedback to front-line employees and related departments on findings.

6. Owner

Owners:
- Training
- Quality
- Supervision

Skillsets
- Experience in the role
- Active listening
- Laser focus (on the call)
- Critical Problem Solving
- In-depth Knowledge of Policies/Services/Products

7. Other Key Success Factors

- Collaboration with Quality and Training and improvements in training curriculum and a more robust Quality Assurance form.
- Better understanding of the customer journey.
- Identify root cause(s) of repeat calls.
- Improve escalation process.

8. Previous example of impact

Westar Energy (Evergy) increase focus on FCR over the last 5 years.
- Quality requirements changed:
  - CSRs ask "Is there anything else I can assist you with today?" or "Have I resolved everything for you today?" Some variation of this to ensure the customer was taken care of on the first contact.
- Partnered with inMoment (after call survey company) and one of the questions asked is:
  - How many times have you called Westar Energy in order to address this specific matter or question?
- FCR resolution went from 50% to 74% in about a year.
- Reduction in repeat calls.
- Introduced more self-service options as a result of reducing repeat calls.

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9. Initiative scoring

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)		Pilot (1-2)	
Familiar/Unfamiliar (3-4)		Small (3-4)	
Unfamiliar (5-6)	X	Medium (5-6)	
Unfamiliar/Uncertain (7-8)		Large (7-8)	X
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	
Quick Wins (1)		Customer experience	X
Near-Term (2)	X	Operational efficiency	
Mid-Term (3)		Team member experience	
Long-Term (4)			

10. Top 3 metrics
1. Customer Surveys (if a system is in place, ask customers)
2. Call Quality (has the customer called before for the same issue?)
3. Call Volume Reduction (no repeat calls in X number of days)

11. Please list other reference material

https://callminer.com/blog/first-call-resolution-benefits/

http://www.oracle.com/us/products/applications/improving-contact-resolution-1599286.pdf

https://www.callcentrehelper.com/difference-measuring-repeat-contacts-first-contact-resolution-140888.htm

Task Force for Call Center Transformation

Identify and integration of current system's and technology - Business Case – Theme – AT: 3

1. **Project Problem Statement**

Call center team members have multiple screens and programs in use at one time creating difficulty in training, finding information and increases the call time for helping citizens.

2. **Business Need**

The State of Missouri needs to help the citizens that reach out to it while being as cost-effective as possible. The more databases, CRMs, websites, screens or processes the call centers have the slower the process of helping the citizen becomes. Having the call centers work from one or two "panes of glass" can reduce hold times of citizens, increases efficiency, increases moral and ultimately saves cost because of these factors.

This impact could have a trickle effect on everything the State spends on its call centers. For example, if the agents can complete calls 20% faster because of increased efficiency that reduces: hold times, estimated time in queue, and number of agents you need to hire.

Increasing moral also reduces your employee turnover which saves untold amounts of money.

3. **Project Impact**
   B. Agent Satisfaction

   Every State of Missouri call center struggled with turnover and replacement of existing agents. Agents that struggle with performance are typically plagued by moral problems as well. Ultimately, people quit jobs because they aren't fulfilled in their role. The more screens and places they need to go to get information the more likely that mistakes will be made. If agents only need to go to one or two screens the efficiency skyrockets.

   C. Teleworker Option

   If agents have less screens it becomes easier from an IT perspective to set them up to work from home. Working from home allows people desired flexibility.

   D. Increased Productivity

   Every click of the screen or interface the agents have to search through the more time it ultimately takes. Time is money. Every second a caller spends on the phone with your agents increases costs for the State. Increasing productivity lows cost.

   E. Lower Training Times

   It can take some department's months to fully train an agent. Reducing the technologies they need to learn can drastically reduce the training time. Lowering the training times can reduce the cost of turnover which every department has.

Task Force for Call Center Transformation

4. Return on Investment (ROI)

Calls are the most expensive interaction the State of Missouri has in its call centers. Reducing those times can help reduce costs.

High Quality Information

Knowing that the agent can get the information they need for the Citizen in one place and quickly helps the agent give them the right information the first time they call.

High Quality Customer Service

Getting the information you need quickly reflects great customer service. Being pleasantly surprised by a quick call phone into the State and getting the exact information you need can be wonderful for the Citizens.

Hours Saved

There will be untold amount of hours saved by bringing together multiple screens into one. Having one place at the agent's fingertips to get the information they need will have a huge impact through all the call center metrics.

Direct Savings

Each call center uses different applications and databases so the cost of integrating these is unknown at this time.

5. General Description

Each call center needs to identify the databases they use and why:

CRM	Where is the database?	Does the Fed allow for integration?	Open API?	What it is used for?	Requires Development
Example CRM	**MO Datacenter**	**Yes**	**No**	**Houses Citizen's Tax Returns**	**Yes**

Identifying each CRM used and why will be helpful in reducing the amount of screens each agent as. Is there any database or CRM that every call center uses today across the State? That might be a good unifying place to start.

Task Force for Call Center Transformation

6. Owner
- Visionary
- Call Center experience
- Understanding of every call center in the State

To ensure the success of this initiative this person needs to have an understanding of the Call Centers statewide and what databases they use on a daily basis to complete their jobs. They also need to have an understanding of how potential technologies could integrate and the potential costs associated with that.

Integration can be expensive if not done in a cost effective way.

7. Other Key Success Factors
Understanding all the databases and CRMs the State uses today is a priority factor. The Federal Government not allowing some integration into their database could also be a roadblock for success.

8. Previous example of impact
Skillpath Seminars in Mission, KS used multiple screens to speak with their customers. By bringing those applications into one CRM it allowed their employees to work from anywhere and reduced their time for training a new employee.

9. Initiative scoring

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)		Pilot (1-2)	
Familiar/Unfamiliar (3-4)	X	Small (3-4)	
Unfamiliar (5-6)		Medium (5-6)	
Unfamiliar/Uncertain (7-8)		Large (7-8)	X
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	
Quick Wins (1)		Customer experience	
Near-Term (2)		Operational efficiency	X
Mid-Term (3)	X	Team member experience	
Long-Term (4)			

10. Top 3 metrics
1. Average Call Answer Time

2. Average On Hold Time

3. Employee Turnover Rate

11. Please list other reference material
N/A

Task Force for Call Center Transformation

Omnichannel routing Business Case – Theme #AT: 4

1. Project Problem Statement

If a customer makes a phone call to the State of Missouri, follows up with an email and consequently initiates a web chat with a chatbot and/or agent, that customer sees it as a single customer service transaction while the contact center sees it as three separate, unrelated transactions.

2. Business Need
Consumers don't like calling companies for a number of reasons:
(Reasons below cited from the book "The Effortless Experience")
1. Make me start over
2. Make me repeat myself
3. Forget who I am and my total spend with your business
4. Treat me inconsistently across channels
5. Transfer me around
6. Send me to someone who can't fix my problem
7. Forget to notify me about information I care about
8. Forget who I am when I come back
9. Make it hard for me to authenticate
10. Make things difficult to accomplish and waste my time

When an interaction is done well, the results are:
1. I don't need to start over
2. I don't have to repeat myself
3. The business knows who I am and my total spend with your business
4. Treats me consistently across channels
5. No transfers
6. Routes me to people who can fix my problem
7. Notifies me about information I care about
8. Knows who I am when I come back
9. Seamless authentication
10. Easy to accomplish my goals
11. Don't waste my time

A single customer interaction needs to be seamless and effortless regardless of
- The amount of self-service used or attempted
- The devices used (phone, computer, web, mobile device)
- The interaction type(s) used (chat, voice, email, video, etc.)
- Whether the interaction occurs over the course of a few minutes or a few days (it may include what would traditionally been viewed as multiple sessions)

Omnichannel routing provides a Single Routing, Queuing, Context and Reporting Engine for communication channels in a unified environment. Agents will be able to engage with customers on every channel from a single intuitive agent desktop.

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3. Project Impact

There are two key drivers behind Omnichannel Routing. One is economic, and the second is demographic. The key economic driver is that voice, which has dominated the industry for decades, is one of the most expensive channels, while chat, email, web, and especially IVR and AI are all lower cost than voice. The key demographic driver is younger citizens want to leverage alternative channels to voice to transact business with the State of Missouri.

An Omnichannel routing solution has the ability to transform the customer experience for the State of Missouri residents in many ways. The business outcomes will be improved citizen trust, customer satisfaction scores, and first call resolutions

- **Meet Customer Expectations** – Customers want a seamless, efficient, personalized experience regardless of channel, time and location. For example, chatbot seamlessly escalates to chat with an agent and can further be escalated to a phone call.
- **Reduce Customer Effort through Automation –** Advanced Technology needs to be part of the omnichannel routing strategy. "How may we help you?" will become the most common question in self-service. State of Missouri will be able to provide one continuous experience for customers when the transition for self-service/bots requires a live agent.
- **Consistently personalized customer experience.** By centrally routing and queuing voice, email, and chat (and new channels) the same routing rules are applied across the entire contact center. This ensures the customers have the same experience regardless of channel.
- **Reduce abandon and deflection rates** by routing interactions based on real-time data about work volumes, resource availability, and other variables. The State of Missouri can proactively provide information in the IVR/chatbot to customers about status on applications to reduce calls to agents.
- **Agent Empowerment Improvements** by providing the agents a single intuitive desktop to handle multiple channels. In addition, agents receive context about a customer's IVR/Chatbot experience, past interactions, customer satisfaction scores and AI driven knowledge.
- **Agents Satisfaction Increases** because they login one time to one desktop to handle all customer interactions. The State of Missouri will have workforce optimization and reporting tools that can manage agents across all interaction channels
- **Improve performance visibility** across sites by centrally monitoring the business and operational performance of interactions, agents, teams, sites, systems, and outsourcers in real time.
- **Reduce administrative overhead** by managing all contact center operations, resources, and interactions from a central command center.
- **Disaster Recovery** - A seamlessly integrated contact center is also an effective strategy for helping your business continue even during weather-related or other types of emergencies. While many inquiries to the contact center will be automated, the remainder will be exceptions and likely to require the help of an agent or expert, that can be located in the office, satellite location or home.

Task Force for Call Center Transformation

4. Return on Investment (ROI)

Agent productivity is what most people think of when it comes to making the contact center more efficient. However, it turns out that optimizing agent productivity, by itself, often does very little to move the needle on cost. ROI on this initiative will be derived from channel mix and understanding why customers are calling.

Channel Mix

Optimizing channel mix can sometimes have the effect of reducing cost per contact by 50% or more. Channel mix is simply the percentage of inbound contacts that arrive at the contact center through various channels: voice, chat, email, web, IVR, AI, and walk-up. In 2008 voice calls represented almost 80% of all contact volume. Today, voice accounts for just over 50% of incoming contact volume.

Voice calls are the most expensive. Chat is less expensive than voice calls because agents can usually handle more than one chat at a time. Email is a non-real time channel with different service level expectations so can be handled when call volumes are lower. The biggest impact to cost reduction will be increasing the use of self-service channels with IVR and Chatbots.

Call Reduction

By understanding why customers are calling, the State of Missouri will be able to reduce the number of contacts per customer and resulting call volumes. For example, reducing the number of agent-assisted password reset calls with self-service could save significant costs and free up agents to handle more complex interactions.

Omnichannel routing will enable pushing text and voice messages on status of applications to customers. By proactively providing status information in the IVR or through proactive contact could decrease the number of calls that need to be handled by agents.

5. General Description

The State of Missouri needs to provide an intelligent contact center solution to route any interaction to any resource (human or digital) with customer context in a unified environment. The solution must accommodate channels including voice, chat and email, emerging AI channels including Natural Language and Chatbots and additionally mobile applications like Apple Business Chat or Facebook Messenger.

The State of Missouri should look at off the shelf solutions that are already implemented at the State to provide omnichannel capabilities and integrations. The ability for agents to handle voice, email and chat interactions is available to the State of Missouri. The integrations to Advanced Technologies like Natural Language and Chatbots are also standard functionality.

Task Force for Call Center Transformation

The Aragon Research Globe™ for Intelligent Contact Center, 201

9
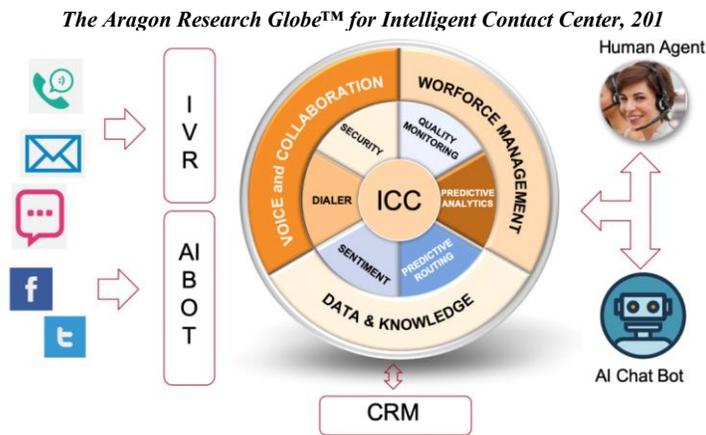
A good reference document is from Aragon Research. It has released its first Aragon Research Globe™ for Intelligent Contact Center. It examines 13 major providers in a market that is in the midst of a transition from traditional offerings to AI-based ones. This shift will signify the beginning of the rise of digital labor.   https://aragonresearch.com/the-aragon-research-globe-for-intelligent-contact-centers-2019/

Also and increasingly, contact center managers prefer to purchase much, or all, of their contact center infrastructure (CCI) from a single source as a bundle in the pursuit of easier and enduring integration, cradle-to-grave integrated reporting and analytics, and easier system management. — GARTNER MAGIC QUADRANT for Contact Center Infrastructure, Worldwide; Published: May 2016

6. Owner

There needs to be a team that owns customer experience across all the state agencies to ensure that standards are put in place. There should be a Customer Experience Office within Office of Administration that owns the vision for the customer experience and sets the guidelines. The Customer Experience Office would also be responsible for standards within the Contact Center to ensure that all the technologies can integrate and make for a seamless customer journey across agencies. The office would include an Officer with a strategic vision, Marketing Resources to help define the vision and customer journey along with IT resources and project management to implement functionality.   There would also be an HR resource to help with defining agent performance standards, agent career mapping, work from home policies and workforce optimization tool standards across the State.

Each agency needs to also have someone that owns customer experience that can tailor the capabilities offered by a single contact center platform. Not every channel will work with every type of citizen interaction. For example, child and elder abuse calls will likely always require agent interaction over the phone.

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7. Other Key Success Factors

The State of Missouri needs to define a roadmap to determine what channels are implemented in the short and long term. Chat and Email can be implemented quickly and at little cost to the State. Advanced capabilities including Natural Language and Chatbots will require some additional discovery and investment. These advanced capabilities can be added to the existing platform in place at the State of Missouri to deliver a cohesive experience for customers and employees.

8. Previous example of impact

T-Mobile has buiit a solution to meet customers where they are and how they want to interact. They have developed a team of experts to increase customer satisfaction and reduce calls. The benefits have been greater with the agents in terms of reduction in agent attrition and increased satisfaction in their roles.
Video - https://video.cisco.com/detail/videos/latest-videos/video/6105694270001/t-mobile-transforms-customer-care-with-cisco-contact-center?autoStart=true
Harvard Business Review - https://hbr.org/2018/11/reinventing-customer-service

The Federal Government has passed legislation that Federal agencies will provide a modern, streamlined, and responsive customer experience across Government, comparable to leading private-sector organizations. https://www.whitehouse.gov/wp-content/uploads/2018/03/The-President%E2%80%99s-Management-Agenda.pdf

9. Initiative scoring

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)	X	Pilot (1-2)	
Familiar/Unfamiliar (3-4)		Small (3-4)	
Unfamiliar (5-6)		Medium (5-6)	
Unfamiliar/Uncertain (7-8)		Large (7-8)	X
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		Type of Impact	
Quick Wins (1)		Customer experience	X
Near-Term (2)	X	Operational efficiency	
Mid-Term (3)		Team member experience	
Long-Term (4)			

10. Top 3 metrics
1. Contacts offered per channel
2. Contacts Offered vs Handled/Abandons/Deflections
3. Phone vs Other Channels

Task Force for Call Center Transformation

11. Please list other reference material

- Aragon - https://aragonresearch.com/the-aragon-research-globe-for-intelligent-contact-centers-2019/
- Standard Reports are available within the Cisco Unified Intelligence Center reporting tool allowing for the State of measure contacts and agents within the agencies and across the state.
- Case Studies - Apple Business Chat – 1800 Contacts - https://blogs.cisco.com/collaboration/contact-center-apple
- Case Studies – Amway https://www.cisco.com/c/dam/m/digital/elq-cmcglobal/OCA/Assets/Collaboration/Amway-Case-Study-Modernizing-Customer-Care.pdf
- Saddletree Research - https://www.cisco.com/c/dam/en/us/products/collateral/customer-collaboration/unified-contact-center-enterprise/contact-center-omni-channel.pdf
- Cisco and BT recently surveyed 5,000 consumers across Europe, Asia-Pacific, and the Americas about their changing expectations for customer service. Review these eight trends against your current contact center capabilities.
  Chat, tap, talk: Eight trends making customers' lives easier
  https://www.globalservices.bt.com/en/insights/whitepapers/chat-tap-talk-transform-your-digital-customer-experience

Task Force for Call Center Transformation

Assess where chatbots can be used across the enterprise Business Case – Theme # AT: 5

1. Project Problem Statement

Many agency conversations with customers are repetitive – frustrating both to customers and support personnel. It is also not uncommon for your customers to experience incoming calls being rejected (blocked or hearing a forced "fast busy" signal) which denies them access not only to an agent, but also to the IVR and self-service options.

2. Business Need

If you could insert better automation, many conversations may well be taken care of in the entry process, saving time. Automating common interactions and providing self-service to your customers gives your agents more time for meaningful work. Your customers won't have long waits for simple requests.

Chatbots can alleviate strain on contact center employees while improving the customer experience and controlling costs. Additionally, they can be used by employees and for business optimization. The primary benefits of Chatbots are to increase self-service success, deflect* interactions from the contact center, and improve the customer experience (CX).
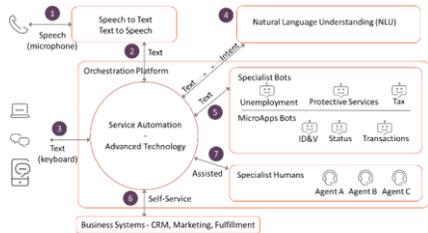
Chatbots automate natural language conversations, even across channels. Blended Chatbots look up customer information and activity to answer questions. They can hand over conversations with context to an agent when needed, or even offer a callback during or after hours.

Across channels, without increasing costs, leverage self-service and automation to meet customer expectations. Accelerate time-to-value and create seamless customer experiences using pretrained omnichannel bots that know your industry and customers. This lets you increase automation and use the best advanced technology blended with your workforce for a human touch.

*deflect = refers to reducing incoming call volume, not reject or block calls (e.g., forced or fast busy)

3. Project Impact

- Reduce Development Effort
  - o Genesys build a bot quickly using pre-built, industry-specific bots and deploy them on every channel with a single platform. Drag-and-drop user interface enables business users to innovate without IT.

- Build Once, Deploy Anywhere
  - o The Genesys Chatbot provides natural language bot capabilities consistently across all interaction channels. Administrators only need to build the automation flow once and then it is exposed through any number of channels that you need. This capability makes the Genesys solution more than just a Chatbot; it is a platform that delivers consistent self-service experiences regardless of how your customers contact you.

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- Human Touch is Essential

  Payback arrives quickly for those who jump into new Advanced Technology - Chatbots. For example, it opens opportunities for coordination or collaborative partnerships across departments and agencies. Save your live agents for interactions where the human touch is essential. It also empowers agents by letting them take on more complex tasks and giving them career growth opportunities.

- Data Collection
  - Bots are better at data collection than humans and agents are then freed up for deeper engagement on phone calls, for example. When you add machine learning into a bot automation strategy, they can become more strategic in anticipating and responding to constituents needs. This reduces the cost of manual research and intervention, and these machine-learning bots can also spot problems, such as website navigation, before they have a major impact on constituents.

4. **Return on Investment (ROI)**
   - Bot Ecosystem - Automate the rudimentary and routine (e.g., Status Updates)
     - Build a Status Micro-App to be leveraged by all interaction channels Voice, Chat, SMS, and Social to provide self-service capabilities to members. Status is often the largest interaction driver and biggest opportunity for automation, as they represent ~25 - 40% of all calls.
     - Reasonability Expected Benefits: ~10% Call Reduction, ~15% CSAT Improvement and ~4% FCR Improvement

   - Improved Customer Experience
     - Reduce the time required to address the customer request, handle off-hour contacts, offer immediate options, and improve outcomes.
     - Reasonability Expected Benefits: < 5% Improvement (Proactiveness & Reduced Customer Effort)

   - Improved First Contact Resolution
     - Present a customer experience that is tailored to the individual based on who they are, why they might be interacting, and the status of the contact center
     - Reasonability Expected Benefits: <5% FCR Increase

   - Reduced Volume of Interactions
     - Increase self-service interactions to reduce agent-assisted interactions for repetitive or common requests
     - Reasonability Expected Benefits: ~25 - 30% containment (e.g., less incoming calls to center)

Task Force for Call Center Transformation

5. General Description

Conversational Language

- The Genesys Chatbot solution lets customers communicate in a natural, conversational language to get their questions answered quickly and accurately, without needing to call or submit additional requests. The native integration of Genesys Intelligent Automation microapps let you easily extend the self-service to chat or any other channels.

Pre-bot checklist (best practices for Chatbots that improve customer experience)

- Determine what do you want the bot to do
    - It's no longer enough to just have a bot; your bot needs a purpose. So, before you implement your new Advanced Technology, look at current problem areas and identify the goals you want it to achieve.
        - Basic inquiry—answer customer questions
        - Interaction assistance—streamline web visits
        - Fostering prospects—Increase lead generation and quality (Sales environment)

- Decide which experience your bot should provide
    - Because the bot will have direct contact with prospects and customers, you need to plan ahead to optimize that experience. This means that once you know the goals you want your bot to achieve, you must determine logistics, appearance and scope of use
        - Logistics—where the bot lives
        - Appearance—from interface to voice
        - Scope of use—when and how to pass to a live agent

- Understand the information you need up front
    - The initial success of a bot is incumbent upon the planning and upfront information put into its development. For a business, there are three basic knowledge areas at the start: bot-specific information, company information and product information. In human terms, this translates to who you are, where you live and what you do
        - Bot information—digital self-awareness
        - Company information—knowledge of surroundings
        - Product information—sensing when to act

- The way forward
    - The prevalence of bots continues to grow—but all bots are not created equal.
        - To implement one that works for your business you need to know what you want the bot to do, how you want it to appear and what knowledge you have available to power it.
        - A well-functioning virtual agent lives or dies by the work and information put in up front. So, in a marketplace where bots are everywhere, a major differentiator is what has already been done and what your agency must do before the technology can go live.

Task Force for Call Center Transformation

- Genesys customer experience advanced technology, brings together Advanced Technology, adaptive learning, bots, cognitive computing and other Genesys automation technologies to deliver proactive and predictive customer experiences.

Enabling Chatbot Capabilities to Improve CX

- Personalization
  - –to tailor the experience based on context from the current interaction or from previous interactions
- Natural Language Understanding
  - – to derive intents and entities
- Identification & Verification (ID&V)
  - – to identify and verify the customer if required
- Directed Dialog
  - – to automate relevant business processes or provide information
- Involve another NLU/Advanced Technology platform including (e.g. Amazon Lex, Microsoft bot framework or Google Dialogflow)
  - – if it specializes in a particular topic
- Handoff to an agent
  - – to connect the customer to a live person with the full context of the interaction
- Offer and schedule a callback
  - – if outside of business hours or long wait time then Chatbot offers an immediate or scheduled callback
- Offer a Chatbot survey depending on business context
  - e.g., Voice of the Customer (VOC) program

6. Owner
- CX Officer for consistency and feedback from legislators and constituents
- Business needs to own the vision for the Chatbot
- IT needs to support the Chatbot
- Knowledge Management needs to be actively involved for accuracy (e.g., policies) and identify gaps in knowledge management tool/source (e.g., used by agents through analysis of Chatbot interactions)
- Reporting and Analytics need to gather data, track, measure and report outcomes/results

7. Other Key Success Factors
- Improve
  - Web containment with automated online experiences, without pushing more interactions to the contact center
  - Voice self-service—replace complex IVR trees with intelligent Voicebots that use natural languages to get customers to the right outcome faster
  - Engagement and qualification of online customers with proactive bots
  - Connected customer experiences with full context
  - Customer Satisfaction

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- Reduce
  - Calls to agents
  - Inability to meet increased channels and interaction volume
  - Agent costs per interaction
  - Number of transfers and repeat calls
  - Lack of customer channel pivoting (i.e., from a call to text)

- Analysts
  - Empowering agents to spend more time on high-value work represents the #1 performance priority for 2019 – Customer Contact Week (CCW) 2019
  - According to Forrester, enterprises that blend AI with humans improved CSAT (61%), operational efficiency (68%) and agent productivity (66%)
  - 72 percent interactions will involve Chatbots by 2022 – Genesys
  - 61 percent increase in customer satisfaction from a blend of human agents and AI-enabled Chatbots, while human agents are 66 percent more productive – Genesys

8. **Previous example of impact**
- Head of Technical Operations and Customer Service Solutions, DNB
  "We assumed that Chatbots will provide 30% reduction in call volume, but actually it exceeded our expectations. It's important to have the possibility to escalate to an agent and give them the full journey view"

  "Even though it's a bot, it's still an agent to us and is communicating with our customers"

  Results: 30% reduction in call volume and <50% chats escalated to an agent (Genesys Customer Success Story)

- Service Owner Communication Systems at Bosch Service Solutions, a Division of Bosch
  "It actually saves us time and money when you consider the cost of maintenance. When something does change, like a regulatory requirement, we would have had to make those changes in all these disparate bot solutions. The chance of missing one or more could cause a lot of problems, including fines for being non-compliant.

  "We were most interested in ease of integration and agent handover capabilities, rather than bot capabilities. For many businesses, it's the other way around. But we see bots as an extension of the service we provide to our customers. Our overriding goal was never about containment within the bot. It was to figure out how a customer could be transferred to an agent without a break in the interaction."

  Results: Reduced maintenance costs & effort (Genesys Customer Success Story)

- Large Bank in Australia
  The Challenge: Offer self-service on digital channels; 25% interactions are "simple servicing" events. Improve the customers' experience and deliver productivity benefits by reducing "failure-based demand" into assisted channels

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Results: In its first week, the Chatbot delivered promising results: 70% accuracy rates of customer intent and very high containment rates 90%+ (Genesys Customer Success Story)

9. **Initiative scoring**

Familiarity (1-10)		Scale of Impact	
Familiar (1-2)	X	Pilot (1-2)	
Familiar/Unfamiliar (3-4)		Small (3-4)	
Unfamiliar (5-6)		Medium (5-6)	
Unfamiliar/Uncertain (7-8)		Large (7-8)	X
Uncertain (9-10)		At Scale (9-10)	
Time to Impact (1-4)		**Type of Impact**	
Quick Wins (1)		Customer experience	
Near-Term (2)	X	Operational efficiency	X
Mid-Term (3)		Team member experience	
Long-Term (4)			

10. **Top 3 metrics**

Business Outcomes/Results

- Improved Customer Experience
    - Reduce the time required to address the customer request, handle off-hour contacts, offer immediate options, and improve outcomes.

- Improved First Contact Resolution
    - Present a customer experience that is tailored to the individual based on who they are, why they might be interacting, and the status of the contact center

- Reduced Volume of Interactions
    - Increase self-service interactions to reduce agent-assisted interactions for repetitive or common requests

Bot Metrics – Measuring Chatbot Performance

- Goal Completion Rate (GCR)
    - Defines when the user's request has been satisfied by the Chatbot. Could be a question answered successfully of a transaction completed. Other names include Closure Rate, Completed Session, Completed Transaction, Successful Inquiry, Self-Service Rate

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- Failure Rate
    - When the Chatbot cannot complete or does not understand the inquiry, and it must be escalated to a human agent. Can be triggered by the Chatbot truly not understanding, or less frequently, purposely triggered when the user offers up a certain inquiry that the company feels needs to be handled by an agent. Other names include Escalation, Failure, Elevation to an Agent, Fall Back Rate (FBR).

- Customer Satisfaction (CSAT)
    - Was the user satisfied with the bot UX and to what degree regardless of whether the inquiry or transaction was 100% completed? A CCTR industry standard, so there are few variations on the name.

- Sessions
    - Defines how frequently users are interacting with the Chatbot. Similar time periods apply, although they tend to be shorter. Can be applied to one user or all. In the latter case, it is used to track how many times a bot on one page or one site is used within a time period, typically per day. Other names include Conversations, Total Conversations, Interactions or Interactions Per User

- Total Users
    - Defines your total number of Chatbot users during a time period. Just define a time period (common periods are 1, 3, 6 and 12 months) and track over time. Other accepted names include Users or User Rate

- New Users
    - Defines your acquired bot user numbers during a time period. Simply define a time period (common periods are 1 week and 1, 3, 6 and 12 months). Other names include Activation Rate or Acquired Users

    - Active Users
        - Defines your return of frequent bot users within a certain time period. Simply define a time period (common periods are 1 week and 1, 3, 6 and 12 months). Other names include Retention Rate or Recurring Users

    - Messages
        - Defines how many back-and-forth comments are made in one Chatbot session. This one is standard but needs perspective as different variables impact this measure. It could vary based on the bot's capability, the complexity of the inquiry, or the personality of the user (chatty or not). Other names include Turns, In-Messages, Bot Messages or Conversation Steps

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- o Average Handle Time (AHT)
  - How long the Chatbot session lasts; but debatable as so many variables can impact the metric. Not only can the complexity of the inquiry effect it, but if the user is satisfied, they may start a second topic, which extends duration because the user is satisfied. Not many variations for this CCTR classic, but another name is Average Session Time. Note that agent AHT may increase slightly as bots often handle a higher percentage of the simple inquiries

- o Topic
  - How many questions or transactions recovered in one Chatbot session. Similar to an IVR call, the user may start with one inquiry but extend to multiple inquiries during the session. More topics can be a good sign as the user has confidence in the Chatbot. Other names include Inquiries, Issues or Subjects.

11. Please list other reference material

Genesys – Blended AI for Customer Experience. Bots and automation collide with the power of human touch. https://www.genesys.com/resources/blended-ai-for-customer-experience

GovLoop – Artificial Intelligence, citizen Engagement, Digital Government. Can AI and Chatbots really revolutionize the citizen experience. https://www.govloop.com/can-ai-chatbots-really-revolutionize-citizen-experience/

Genesys – CX Tour for Government in Washington, D.C., featured speaker, Rick Parrish, VP, Principal Analyst at Forrester. https://www.genesys.com/blog/post/how-the-3-dimensions-of-customer-experience-serve-government-agencies

Forrester – Artificial Intelligence with The Human Touch. Blend AI with Human Agents to Improve Both Customer and Agent Satisfaction. https://genbin.genesys.com/old/resources/Artificial_Intelligence_With_The_Human_Touch_v2.pdf

Genesys – Making the Human-AI Connection in the Contact Center. https://www.genesys.com/blog/post/making-the-human-ai-connection-in-the-contact-center

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Glossary

Abandoned Call A call that disconnected within a short time period after it was offered. The time period is set by and can vary depending on the contact center.

Advanced Technology Features like Speech Recognition, Text-to-Speech, Artificial Intelligence, Call Analytics, etc. which can be used to serve the caller through automated or more directed assistance as well as provide the business users with more information to understand how the systems are being utilized.

Chatbot A text, web, or voice chat, generally accessed by a link or button on a web page or mobile app, which provides the user the ability to search for information, receive information about their accounts, and if needed, talk with a representative.

Customer Relationship Management (CRM) A software solution that helps call center agents access the right information and knowledge about a customer's history to improve the overall customer experience.

Customer Satisfaction (CSAT) A score that indicates how satisfied a customer is with a transaction.

Deflected An attempted contact by a user that was not able to be placed into a queue. This could be due to the queue being full, the contact received after normal hours when a representative is not available, or due to the system being at capacity in terms of trunk or license availability.

Interactive Voice Response (IVR) An automated telephony system that interacts with callers using voice and/or touch tones. These systems provide the user the ability to receive information about their accounts, receive contact and general information about the business, and if needed, talk with a representative.

Key Performance Indicator (KPI) These are metrics identified by the business that provide a baseline of the expected, acceptable, and preferred measures. These can include items for both the systems and representatives like the number of calls handled, hold time, call handle time per agent, customer survey responses, time to answer, system capacity and performance, etc.

Omnichannel The ability for a user to make contact through multiple methods such as call, text, web, or email.

Queue A call queue is where callers are placed on hold, while they wait to speak with a live agent. In other words, the call queue is where customers are placed after completing any interactive voice response prompts but before a call center representative has spoken with them. In no front-end IVR, and all agents are busy, the caller would be placed in queue as soon as the call was connected.

Short Call A call that disconnected within a short time period after it was offered. The time period is set by and can vary depending on the contact center.

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Service Level Agreement (SLA) Defines the expectation for the service being provided by a vendor or a business to the customer. This can be an expected time for a contact request (call, chat, email) to be answered, or the performance, timeframe, or quality of a product or service.

Session Initiation Protocol (SIP) SIP is the name of the protocol used for the telephone company circuits that handle the calls in and out of the phone systems. These circuits are able to handle large volumes of calls at lower cost.

Telework This is the general term for users who are working remotely from outside the normal business network, usually from home utilizing a virtual private network (VPN). This allows users to access services like email, network file shares, place and receive phone calls, and other work as if they were connected to the business network.

Trunk This term is used to describe the circuits or network connectivity that allows for calls to be sent and received. This can include SIP, T1, and PRI circuits used to transport calls to and from the public telephone company or between telephone, contact center, and other systems on the network.

Virtual Agent / Assistant A type of user interaction that can include artificial intelligence to provide automated and context driven results to a search or question. This type of functionality is generally used with voice or text prior to, or instead of, talking with a live representative.

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