# Decide with Data: Impact Customer Experience Now

## Your team needs both perspectives to achieve the outcomes you expect to deliver.

To create a balance of strategic and tactical call center management, there are a lot of variables to consider. There is a constant tension in striking the balance between running an efficient team and effectively providing a satisfying customer experience. Knowing what data to analyze, when and how to apply it, and the business insights it provides for daily complex situations, sets the good apart from the best call center organizations.

So what's the management approach that provides desired outcomes in terms of efficiency and effectiveness? Is it strategic or tactical? Let's discuss both and give you some tips to find the management approach that fits your needs.

## What is Strategic and Tactical management?

Let's start with a few definitions and examples to clearly differentiate between the two:

## Strategic Management

Strategic management is a long-term plan that executes over several months or years and heavily relies on historical big-picture data. It's strategy that includes significant decisions such as hiring and staffing levels, processes and procedures and annual goals. Here are some earmarks of strategic management:

- It's proactive—you are making decisions that will impact the future of your organization.
- It has long-term effects on your organization.
- It's goal-oriented.
- It asks "what if?"
- It is used by Senior Management and call center management.
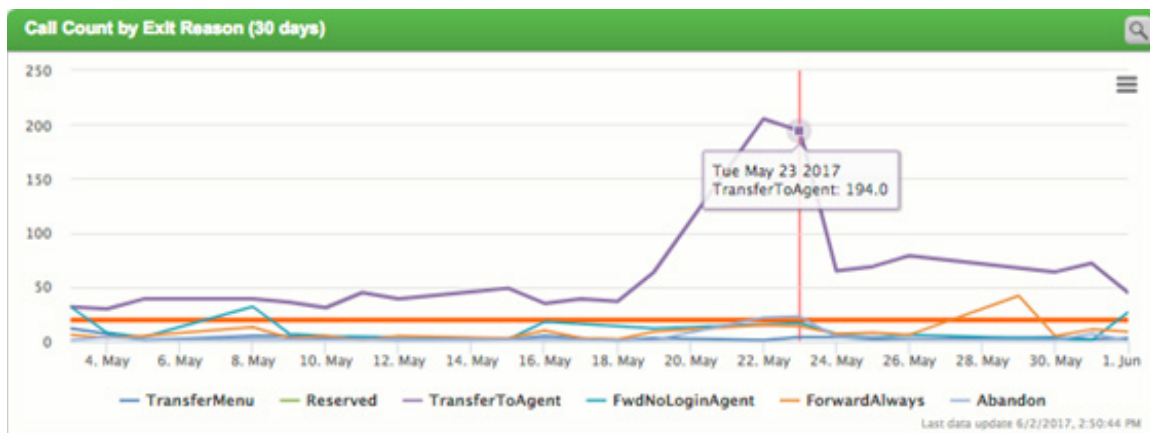
## Tactical Management

| Queued Calls | | |
|---|---|---|
| **Billing** | **Customer Service** | **Sales** |
| # Queued | # Queued | # Queued |
| 0 | 0 | 3 |
| ⏱Cur Max Que | ⏱Cur Max Que | ⏱Cur Max Que |
| - | - | 0:14 |
| # ACD In | # ACD In | # ACD In |
| 0 | 110 | 105 |
| TSF | TSF | TSF |
| **0%** | 87% | **76%** |

Tactical management involves what you may have heard referred to as an "OODA Loop": observe, orient, decide, act. Lather, rinse, repeat. This is the implementation of the strategic planning and the reaction to the day-to-day that seeks to align organizational operations toward the strategy. It includes following those processes and implementing contingency plans based on how well the strategy is working and other unseen variables.

- It's reactive—your floor managers are reacting to what's happening right at this moment.
- It has a short-term impact on your organization.
- It's results-oriented and shows the efficacy of your strategic planning.
- It asks "what now?"
- It is used by call center supervisors and agents.

# Here are Four Takeaways for Using Strategic and Tactical Management to Shape Your Customer Experience

## 1   You Need Both

> **Everyone has a plan until they get punched in the mouth.**
>
> -MIKE TYSON

Strategic planning and tactical management are two very important tools in your call center toolkit, and they are heavily interconnected in the creation of your customer experience. Here's the biggest key to effecting positive changes: you need to use both in conjunction to create an excellent customer experience. You can't have one without the other, and you can't simply execute one and then "move on" to the other. Strategic planning processes and tactical execution of operations should live in symbiosis.

> Let's take a basic measurement such as abandon call rate and show how strategic and tactical metrics are important to achieve your goals and what that means for your customer experience.

Abandon rate, in particular, tends to be finicky. If your abandon rate is too low, you're probably overstaffed. If your abandon rate is too high, you are risking your customer satisfaction rating.

In order to find the right abandon rate, you need to first review historical data to determine where your abandon rate is and adjust your staffing levels to meet your goal (we recommend starting between 4% and 8%).

However, by dialing in to a specific staffing level, you are eliminating your room for error. If you have a unexpected spike in call volume, your finely-tuned staff may not be able to keep up. This is where real time data will save your bacon—with the ability to adjust staffing for your call center on the fly, you can pull in resources when needed if you have the right information available to you.

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The key to achieving your goal with that metric is the combination of strategic and tactical management. You can't set the threshold without a historical analysis, and you don't know when to act on shifting resources without a window of real time analytics that show you the current customer experience.

## 2   Know What Data to Use When

Having easy access to reports, and visualization of what your data is trying to tell you, is vital to the success of your contact center. But more importantly, your organization has to know how to apply different types of data to strategic and tactical management processes.
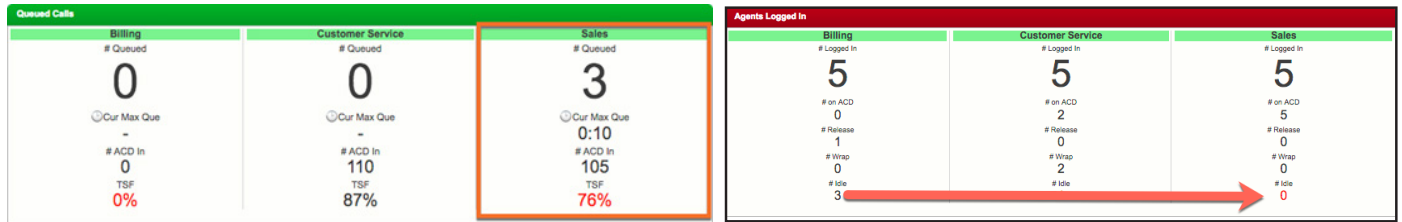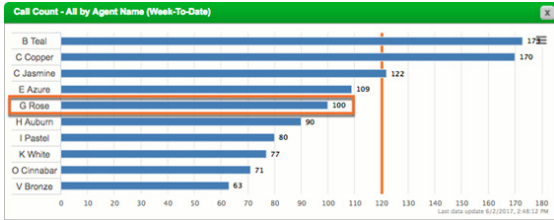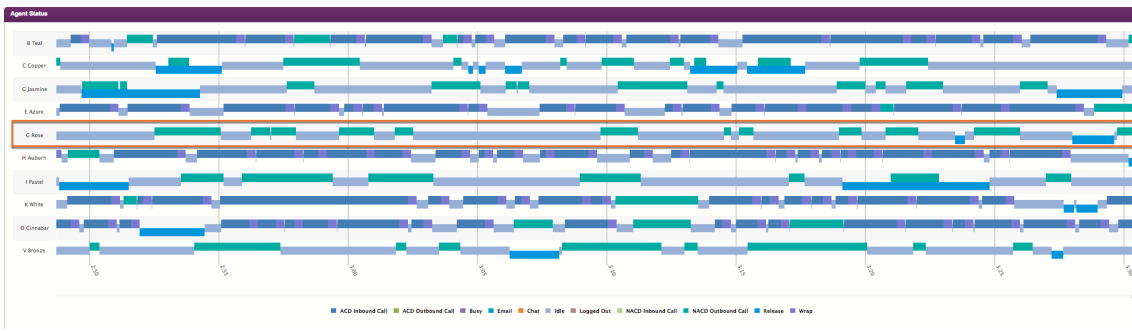


Strategic managers will need to look at the big picture for trends and data that is measured over a long time period. Tactical managers use metrics available in real time to determine how well the strategy is working at any given moment.

Strategy is creating a plan, and tactical is executing that plan.

Here are some examples of knowing when to use what data:

| EXAMPLE | TYPE OF MANAGEMENT | WHY |
|---------|--------------------|-----|
| On a Tuesday a manager notes a huge spike in call volume between 1 and 5 PM. | Strategic and Tactical | It's not advisable to make a major decision like hiring another agent from one point of data, but that manager should make a tactical response to address the immediate need. After the call volume settles down, that manager should review strategic data to see if that time period spikes frequently. |
| You're planning staffing levels and budgetary requirements for the year. | Strategic | Management should look at historical trends to determine staffing levels. Considerations should include day of week, time of day, seasonality, external events like holidays or product launches planned to schedule the right staffing level on a daily basis. |
| An agent supervisor notes that a certain employee is not on track to hit their goal during the day. | Strategic and Tactical | The supervisor should work with that agent during the day to ensure they are aware of the shortcoming and give them an opportunity to correct. Then managers should review historical data to determine if it was just a one-time issue or if that employee needs coaching. Waiting until after the agent has missed their goal to notify them is counter-productive and demoralizing. |
| Your leadership and management team is sitting in a board room strategizing about staffing levels while the phones are ringing off the hook and customers are getting frustrated. | Tactical | It's time to look at the realtime data and take immediate action to alleviate the current situation. But later, take a look at historical trends to ensure that meetings are set for off-peak hours. |

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> Strategic management builds muscle, and tactical data gives you the flexibility to use which muscle you need in the moment.

- MATT BEATTY, EVP CUSTOMER SUCCESS

## 3 Get the Right Information in Front of the Right People

One of the most important factors in applying metrics effectively is getting the right metrics in front of those who need them.

| ROLE | TYPE OF INFORMATION NEEDED | SAMPLE METRICS |
|---|---|---|
| Senior Management<br><br>I.E. Call Center Manager, Sales Vice President, Executive | Strategic and Tactical | It's not advisable to make a major decision like hiring another agent from one point of data, but that manager should make a tactical response to address the immediate need. After the call volume settles down, that manager should review strategic data to see if that time period spikes frequently. |
| Call Center Floor Leaders<br><br>I.E. Call Center Team Lead, Agent Supervisor and Group Center Manager | Tactical (Real Time) | Calls Presented vs Calls Answered<br><br>% Calls Answered<br><br>Queue Time<br><br># Calls Today (breakout by type)<br><br>Time by Release code |
| Call Center Agents<br><br>I.E. Customer Service Reps, Salespeople, Call Center Agents | Strategic and Tactical | Personal historical scorecard with real time feed of metrics they can affect immediately. |

Sometimes the measurements for strategic and tactical management are the same, but the time frame you're looking at is different. Strategic managers look over days, months and sometimes years to determine patterns and trends, while tactical management is looking at what's happening right now.

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## Set Your Team Up for Success

The point of this effort is to achieve your business objectives, whether they are increasing your sales, successfully addressing customer issues or scheduling appointments for your organization. The goal is to set up your teams for success.

Take the example of SLA (service level agreement). Many organizations choose an arbitrary time in which they require their agents to answer calls. But using strategic and tactical data effectively can help you turn that arbitrary number into a realistic and achievable goal and measure that success.

Here's the process:

Compare this to your current SLA.

**SLA Process**

**1** Use your abandon call metrics (abandon percentage, queue times, hour of day, day of week) to determine how long customers are willing to wait.

**2**

**3** Use those metrics and comparison to set a more realistic and achievable SLA; this SLA should aim to achieve the perfect balance between proper staffing and customer satisfaction.

**4** Once you've identified the appropriate SLA, feed it into your real time metrics and set up an alert to let managers know every time the SLA is being exceeded.

**5** Poll those managers to get a feel for how often the SLA is not being met.

**6** Cycle through this feedback and review those strategic metrics on a cyclical basis and adjust this SLA based on the analytics you gather.

This process can be applied to most of your policies and procedures to ensure that the goals you are setting for your organization are achievable and contribute to the desired business goals.

> **"** If you're working on your strategic metrics, you're minimizing your room for error. You're really dialing in on your staffing levels, or your queue time relative to abandoned queue time is perfect. What that means is your tactical metrics become all the more important. If, all of a sudden, you're getting overwhelmed, you need to know that and you need to be able to react quickly. You've removed your extra wiggle room with staffing and overhead, so as soon as that trend shifts you need to know. **"**

- PETER HORNBERGER, BRIGHTMETRICS DIRECTOR OF CHANNEL SUCCESS

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The best way to do this is to use the appropriate data perspectives for strategic and tactical management in tandem to achieve the desired business outcome.

Remember:

- Strategic is planning.
- Tactical is executing.
- Strategic is long-term and based on historical data.
- Tactical is an immediate response to a situation currently taking place.
- Strategic is staffing your call center at the appropriate level.
- Tactical is pulling in agents you've cross-trained (as an outcome of your strategic planning) from another department when you experience an unexpected deluge of calls.

The best combination of strategic and tactical management sets up your organization for true success. It determines the difference between patterns and anomalies and sets realistic goals based on those trends.

# 3 Considerations to Get Your Team Started Now!

## 1 Know Who Needs What Information

| ROLE | TYPE OF INFORMATION NEEDED | SAMPLE METRICS |
|---|---|---|
| Senior Management<br><br>I.E. Call Center Director/ Manager, Sales Vice President,<br><br>Executive | Strategic (Historical) | % Calls Answered<br><br>Call Center Load<br><br>Idle Time<br><br>Break Time<br><br>Transfer Rates<br><br>Avg Call Time<br><br>Treatment time by wrap code |
| Call Center Floor Leaders<br><br>I.E. Call Center Team Lead, Agent Supervisor and Group Center Manager | Tactical (Real Time) | Calls Presented vs Calls Answered<br><br>% Calls Answered<br><br>Queue Time<br><br># Calls Today (breakout by type)<br><br>Time by Release code |
| Call Center Agents<br><br>I.E. Customer Service Reps, Salespeople, Call Center Agents | Strategic and Tactical | Personal historical scorecard with real time feed of metrics they can affect immediately, |

## 2 Remember When to Use the Right Data

| TYPE OF DATA | WHEN TO USE | COMMON SITUATIONS |
|---|---|---|
| Strategic | Planning, creating policies and testing the success of those strategic plans. | Determining staffing budgets for the year, deciding how many departments to cross-train and conducting call center agent performance reviews. |
| Tactical | Responding to current situations, helping employees reach their daily goals and correcting customer or call center issues like high wait times and abandon rates. | Experiencing call center volume spikes and responding by pulling in another department to help handle calls, alerting an employee to their progress during the day to give them an opportunity to correct. |

## 3 Know How to Organize Your Data

When you're looking at metrics for both strategic and tactical usage, you might use the same metrics for both. The key is looking at the correct time frames for best use in both scenarios and using the data in tandem.

| SITUATION | MANAGEMENT TYPE | TIME FRAME FOR USAGE |
|---|---|---|
| Have an abnormally high call volume one day. | Tactical | Immediate occurrence: need to pull in other department to handle volume. |
| Have an abnormally high call volume one day. | Strategic | Review call volume for that day, then compare it to day of week, time of day and other factors from a historical perspective to determine if there is a pattern that needs a procedural change, or if an anomaly. |
| Your call abandon rate is higher than you would like. | Tactical | Conduct mid-shift coaching to answer calls more quickly and reduce the metric in the moment. |
| Your call abandon rate is higher than you would like. | Strategic | Take a look at your overall abandon rate and compare it by time of day, day of week, monthly recurrences and staffing levels to determine if a policy change is necessary to hit your targets consistently. |

## Business Intelligence for Strategic and Tactical Management

If you can't access these analytics for your ShoreTel phone system in a way that's convenient and formatted to your unique needs, contact Verteks Consulting at 877-292-9721 to ask about a free 21-day trial from our partners at Brightmetrics. They provide business intelligence for strategic and tactical management from your ShoreTel phone data.

### START YOUR FREE TRIAL TODAY!

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