



## **Thinking People**

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on behalf of CCA Industry Council*

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## CCA INDUSTRY COUNCIL

Managing customer contact operations is becoming extremely complex with a vast array of choices in new technologies, sourcing options, people strategies, not to mention the task of reporting accurate and meaningful management information. All of this whilst continually improving customer experience to stay ahead of the competition and delivering the same or more for less.

CCA understands these challenges and with over 14 year's experience, is the leading independent authority on customer contact strategy. Our journey began with helping people manage better contact centre operations and putting them in touch with experts. Our network has now expanded to over 7,500 senior professionals globally who are responsible for the continual enrichment of these services.

Our core principles of independence, credibility and trusted advisor status have remained a constant throughout.

Organisations now recognise the need for enterprise-wide ownership of the customer experience. Being part of CCA means so much more than running a successful contact centre, our offering is designed to help position customer contact at the heart of the organisation.

Four years ago CCA created a unique thought-leadership Industry Council to drive this change. Representatives from our **Foundation Partner Group** and Global Membership are invited to take part in this ground-breaking initiative.

Enlightened organisations understand how to distil front-line interactions and to segregate useful insights to help formulate strategy. Our products and services are designed with this in mind and are constantly honed and refreshed by the experience of our growing network.



## Foreword from Cheryl Black, Customer Service Director, O2 & Chair of CCA Industry Council



I am delighted to be the Chair of CCA Industry Council and am enjoying working with some of the leading contact centre directors in the UK to share knowledge and set the future agenda for the industry.

As Customer Service Director of O2, I see first-hand many of the challenges of customer contact in the 21<sup>st</sup> century. In addition to handling nearly 70m calls a year, we respond to many e-mails, texts and internet self-service queries.

The latest Industry Council topic is Thinking People, a subject of great importance to an industry that employs close to 1 million people. This is at the heart of the future of our businesses and public sector organisations. The key question we have posed ourselves is: what are the changes in the role of the contact centre agent we can expect in the future and what knock-on implications are there for our management practices and styles? At the core of this is the question of to what extent will we need our people to cope with the growing complexity of inbound contact, while much simpler contact (bill enquiries, delivery status, etc) goes online? Or will this complexity be resolved by the range of smart technologies which increasingly promise to deliver answers to agents in real-time?

Our experience at O2 is that people are vital in our goal of turning our customers into 'fans'. Great products and industry standard value are important, but our customers' interaction with our in-store gurus and my own team of contact centre advisers creates the personal connection which drives real enthusiasm towards O2. As the public become more demanding, the ability of our team to problem solve, to engage with customers and empathise, are critical in achieving our targets for customer satisfaction.

We have a good range of papers from the CCA Research Council to help us understand the Thinking People topic. Ipsos MORI and Gallup have identified the changing working environment, while the latter focuses on the importance of employees in building brand value. Bright Index provides strong industry insight and Calcom take an approach which draws on their years of training agents and advisers. Lastly, Horzon2 with Dr Guy Fielding, draw out some key future insights around the management of the knowledge worker in our structured working environment.

As industry leaders we are informed by the work of the Research Council. However it is down to us to influence our boards and take the decisions which will define the future of customer service. We look forward to that challenge since we touch many, many lives through the breadth of the organisations represented on Industry Council.

Once again, CCA's Foundation Partners deserve praise for having the vision to set up the Industry Council, which over the last few years has gone from 12 to 34 members. Its influence on our industry has continued to grow. Our commitment to raising the profile of contact centres is a vital and on-going task.



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## Executive Summary by Marcus Hickman, CCA Executive Research Director



A key uncertainty in the future of contact centre management is the extent to which technology will enable today's adviser to meet the challenges of growing call and contact complexity. As a large tract of everyday, simple contact shifts to voice, mobile or internet self-service, tomorrow's contact centre will move away from the high volume of repetitive traffic seen today. Some have argued this will require a 'knowledge worker' in place of a call centre agent, someone who can empathise with customers, solve problems and work super fast. For others, the solution lies in technologies like speech analytics, intelligent knowledge bases and real-time analytics.

These and other drivers of change could revolutionise the way organisations recruit, train, manage and develop people. Indeed, there are a set of Customer, Economic/Social, Technological and Organisational trends which will have an uncertain impact on contact centre operations.

As always, this impact is uncertain, but it is widely forecast to challenge the now well established 'manufacturing' or 'Fordist' culture of management. It could mean that to quote Anne Marie Forsyth, CCA CEO, "If we were starting all over again today, the way we manage our people might be completely different from the 1990's model". Let there be no doubt, people are vital:

- Both Bright Index and Gallup argue in their papers that employee engagement is directly linked to customer engagement and then to bottom line revenue
- Yet only 38% of agents know what their organisation's brand stands for according to Gallup
- According to LV= it takes a £7,000 investment to recruit and train a new agent.

The industry needs engaged and motivated people. What are the drivers of change which might make contact centre models and management quite different in the next 3-5 years?

The following captures discussion among the Industry Council, Research Council and draws on published sources.

### Customer drivers

#### Increasingly autonomous

Customers are turning away from brands and institutions and loyalty is increasingly becoming a thing of the past. Online research, loss of trust and more choice mean organisations need to work hard to stay close to consumers and also to get their attention as the old marketing tools are less effective.

**Technology poles-apart**

Some customers are flying with new technology, eg 30% have smart phones and many regularly use mobile web. The uptake of new technology, such as iPads, Androids, social media, super-fast broadband and location based services, means consumers have a range of ways of contacting organisations. However, nearly 30% are still not online and this is not changing fast. For these consumers, self-service remains difficult.

**Cussed complainers**

More questioning and demanding as education of consumer rights increases, customers' requests are likely to be less 'cap in hand' and more directive, complex and technical. Already in financial services there is evidence of widespread 'professionalisation' of customer complaints, making advisers' jobs more time consuming and stressful. This behaviour will extend to other sectors, including government.

**Customer communities**

The collaborative consumer has become mainstream through social media. With over 100m on Twitter and Farmville and over 500m on Facebook, people are increasingly turning away from organisations and asking each other for advice and recommendation. Independent forums such as TripAdvisor are being replicated in other sectors. People are using YouTube to create helpful videos for a range of products and services.

**Beware celebrity power**

More than ever organisations cannot afford customer service failure for celebrities who will claim extra fame by slagging off brands and government services. Not only does this create an individual problem for an organisation but it spreads to a huge network, such as Lily Allen (2.6m followers), an impact which can be unpredictable.

**Self-service independence**

Internet and voice self-service is increasingly successful at replacing voice conversations, but sometimes they cause organisations to lose connection to customers and the ability to cross and up sell. Consumers value this independence - but is the consequent decrease in revenue acceptable for organisations?

**Customer diversity**

More ethnic groups, differing lifestyles, changing working routines and diverse attitudes mean organisations have to respond to a wider range of customer types. For example alternative family structures, non-Christians and immigrants all have subtle but distinct communication styles. This requires excellent listening, cultural awareness and conversational skills to successfully connect with a varied customer base.

## **Economic and social drivers**

### **Labour over-supply?**

With unemployment at 2.5m, those who are long term out of work amount to 1/3rd of the total available workforce. Unemployment is higher among the under 25s and over 50s, both age groups who could be employed in contact centres. Although many will not have the right IT and communication skills, there is likely a good supply of labour for existing contact centre operations keeping a natural cap on cost.

### **Price and wage inflation**

The prices of essentials – food, fuel and energy – are rising again with interest rates predicted to edge upwards in 2011. With inflation up, the restraint of unions and employees alike could give way to stronger demands for wage increases. Some will be able to resist these calls, but highly unionised environments may struggle.

### **Value economy**

Government deficit will drive budget cuts in the public sector and limit economic growth with a target to meet of 2.1% GDP in 2014-15. Companies will feel a knock on impact, as will consumer spending power. All buyers, whether in business to consumer or business to business organisations will be looking for better value. To what extent will organisations be able to prioritise expenditure on good customer service?

### **Global offshoring threat**

Globalisation and the increase in range of offshoring locations and capabilities, poses an on-going check on the costs of UK based operations. Although organisations may be reluctant to take 'voice' overseas, there are other channels and back office functions which can be outsourced at lower cost. The range of offshoring options is growing with Egypt, the Philippines and South Africa among others.

### **Gen Y differences**

Social Media, Mobile and Visual culture driven - they are not wedded to one channel or solely digital natives as predicted - but go to the shops and use the phone as previous generations. 45% of 15-24s access online content on UK smartphones. As employees they offer new skills and require more open management styles. There is anecdotal evidence they may lack traditional disciplines of grammar, research and deference. Further 'command and control' management seems out of step with these people.

### **Third agers flex muscles**

The ageing population will increasingly have the money and wealth targeted by organisations but some will also require more and more government services. Many are able to use new technologies, but others prefer a more traditional approach of communication channels and styles. Do they prefer talking to their own age group and are they are new workforce prospect for tomorrow's contact centre?

## Regulatory

### Employee protection

Although there are no immediate changes, employee protection and litigation is likely to rise in importance. Employer to employee relationships will require the correct practices - evidenced by an audit trail, which will add cost to organisations but also restrict freedom to act without consultation.

### Data protection stronger

While consumers and government are happy to discuss and debate issues through social media and increasingly communicate in a virtual world, there are concerns about the personal data privacy. Changes from Europe could involve even tighter ID&V and data protection processes. Will this damage the customer experience?

### Regulating against failure

Although a Conservative government may be less demanding of businesses, high numbers of complaints about brands will force action, fines and changes. Eventually regulatory requirements for service levels may arise, and perhaps CEN is the first step. Whatever the requirements, organisational failures will be harder to conceal.

### Online control

After years of relatively limited regulation and state control, the online world will start to be the target of regulators, beginning with the Advertising Standards Association which from 2011 will measure online advertising. This may extend to more integration with traditional call centre communication.

## Technology

### Database and interaction analytics nirvana?

As organisations combine views of consumers' channel use, they will learn more about behaviours and attitudes of individual customers. This should mean better tailoring and presentation of information to customers and dialogue prompts to advisers. Callers can be profiled by their customer history, psychometrics or demographics and then routed to the most appropriate agent. How soon will this future arrive?

### Real time decision support

Eventually, organisations and agents will have access to real-time decision support to help with interactions. This will change the appearance of web-sites, apps and IVR scripts depending on the customer and the purpose of the interaction. Agents should have the same support, but how effective will it be?

### IVR and voice self-service roll out

Although fraught with problems, IVR and voice self-service has had volume success in financial services and mobile telecoms. Often used for simple interactions, improved tailoring of menus and natural language capability means it should be applicable to more complex interactions.

**Unified communications coordination**

Will we need a centralised call centre, or can queries and requests now be re-routed to experts throughout an organisation? UC promises to improve internal business communication but also business to customer contact through voice and data transfer, audio conferencing, presence tracking and multi channel coordination.

**Video at last?**

Long predicted, video calling and conferencing is becoming more widespread with 6% of online consumers using it regularly either at work or through Skype at home. This behaviour may shift to organisational communication, where Gen Y at least see the value in being able to see an agent when they put you on hold! What will this mean for the agent, perhaps a little less control of the call?

**Clunky desktops abolished**

Although technology always promises seamless delivery, agents often have to deal with a range of applications and overcome technological hurdles. Sometimes this means bypassing the system altogether in order to deliver service. A unified desktop with applications seamlessly integrated is a real possibility and will speed contact handling and make knowledge bases more available.

**Speech Accountability**

As speech analytics is deployed successfully, more organisations will be able to monitor customers and agents. This will raise the possibility of intervening in interactions to improve customer experience but will also provide agents with more feedback and improve quality management. Great and poorly performing agents will be more obvious, while training needs and process improvements should be a result.

**Technology promises but people deliver**

Although technology can make work easier for organisations, often it is down to the capability of agents and advisers to implement service delivery with sub-optimal technology. IT projects historically over-run and good people have to 'plug the gaps' and 'cover-up' for failure. As more systems are deployed, and need to be integrated, will this become easier or harder for colleagues?

**Organisational & HR****Marketing speed**

Organisations are launching new products, services and changing policies fast, with each change requiring instant sales and customer service back up. People, processes and systems struggle to keep up and sometimes consumers know better what's available online than staff.

### **Inter divisional rivalry leads to customer service squeeze**

Marketing, sales, operations and senior management sometimes express frustration at their own contact centres. They value designing, manufacturing and selling but often do not credit as highly the supporting service. This creates a difficult environment for inter-departmental relationships. Advisors sometimes feel undervalued, but could customer segmenting and rationing service delivery be an outcome?

### **Human understanding**

Our understanding of what motivates and drives employees is improving all the time. Whether it is psychology, psychometrics, neuroscience or management theory organisations are now more capable of understanding how to get the best from people. We know that roles with low autonomy and variety are often difficult for people. Values and respect are recognised motivators. Equally, salary is always important and a voice in the organisation is valued too, but is satisfying these motivators realistic with thousands of colleagues? Are people's motivators too diverse to manage and do they get in the way of answering calls?

### **Employee engagement challenge**

Low levels of employee engagement are an on-going drain on the organisation and costly in terms of revenue according to Gallup. Firstly, they lead to high recruitment and induction costs and secondly, they result in variable or lower than optimal performance. To maximise resources deployed, organisations need to invest in human motivators which seem costly but in the long run deliver value.

### **Leadership critical but power to people**

Strong leaders are vital and always will be. But more answers need to come from the people and consumers, rather than just directives from management. Organisations will look for more feedback from the frontline and will require the involvement of these people in on-going improvement of processes, products and services. Colleagues need to feel empowered to make suggestions and rewarded for their actions.

### **What are the implications for people in contact centres?**

The certainty and impact of these drivers varies and as a result the consequences for those working in contact centres vary too. Some drivers seem to be more generally accepted by the contact centre community while others are subject to strong dispute. For example, Nickie Hawton of Harding & York makes the point that the industry already employs good people and its management which needs to change. Ultimately, it is managers and directors who shape the future have to draw their own conclusions. That said, some of the drivers which are more accepted are Customer, Regulatory and Organisational.

However, there is less certainty around the labour market and technological drivers leading to the question: ***To what extent will technology enable today's adviser to meet the challenges of growing call and communication complexity?*** At the same time the cost and availability of skilled people is also uncertain as the speed of economic recovery is unknown. If the industry needs knowledge workers, will they be affordable?

The scenarios are illustrated below:



## Next steps

This is not to let managers 'off the hook' and suggest that new management, cultural and psychological methods are not worth employing or that we wait for the impact of technology.

### Trial the future

Some organisations will create new call centre models within the existing larger operation, to serve a segmented customer base or as a trial. They will be able to test new approaches including management styles and the deployment of highly skilled knowledge workers. Others will experiment with technology. As the ability to deliver a segmented service strategy grows, this testing will become more and more feasible.

But there are still up to date guidelines of how to manage people today and the following has been adapted for Thinking People from the Harvard Business Review Model (2008).

### Integrating real-time insight

Measurement of customer, market, operational and employee data is increasingly easy and real-time. Speech analytics will multiply what is available so organisations can track the growth in complexity of contact and the effectiveness of response:

- are agents struggling?
- is their process failure?

- how engaged are employees?

### **Operating and resource planning**

Although overshadowed by lean management, organisations need to redesign values to match culture change and evolve resource planning to be more colleague centred. Part of this is ensuring that we match people's capabilities with the tasks which are most suitable.

### **Talent reviews**

Revise skills audit to focus on the skills which matter going forward – emotional engagement, problem solving and willingness to learn and change. Run regular learning forums and create a more open management style.

### **Coaching**

Critical to raise performance, there are opportunities to set up new support mechanisms to develop agents as never before. Support coaching from operations managers to team leaders to advisers, creating and protecting the time for coaching. Coaching should not equal 'failure' or punishment.

### **Colleague task forces**

Generate ideas, improve service levels, support learning activities: scorecards (or whatever), internal website, videos, setting up a customer room where people can take their ideas. Encourage participation and emphasise that managers don't have all the answers.

### **Leaderships and management development**

Develop manager master classes to create a new environment in the contact centre. Design principles, objectives, content and activities around the agent and move away from command and control while retaining compliance.

The extent of change in customer service and contact centres is uncertain. However, there are actions which the Industry Council will support in order for the contact centre industry to take the next steps and evolve the people environment for whatever the future brings.

## CASE STUDY

LV=

### Background to LV=

LV= employs over 4,200 people, serves over 3.8 million customers and members, and manages around £9.5 billion on their behalf. We are the UK's largest friendly society and a leading mutual financial services provider.

Our company mission is to help people to 'look after what they love', through a wide range of financial products and services. LV= has three distinct business lines – life and pensions; general insurance; and asset management. We summarise our philosophy in our advertising strap line 'If you love it, LV= it.'

We may have been looking after people and their needs for a long time, but we know it's important to move with the times. So in March 2007 we decided to re-brand to LV= to refresh our image. Our new name recognised our heritage - the L and V representing Liverpool Victoria - while presenting us in a more modern and vibrant light. It's shorter and more memorable, and the equals sign (=) shows that we are a society of 'equals' – we're owned by our members with one-member-one-vote and we don't have to answer to external shareholders. This mutually and equality runs through the very core of our business both when it comes to servicing customers but also in the way we treat our employees.

*This case study focuses on our general insurance business.*

### Our reasons for our method

To us it is obvious that if we expect Agents to give a truly exceptional service to our customers, they must feel equally well backed-up by their leaders and organisation. This is easier said than done, and it is hard to execute. I believe many organisations fall back on the Command & Control method, which is necessary but misses so much.

In our industry, a great customer is one who calls to buy a policy, doesn't need to call again to amend, claim, etc and then automatically renews their Car / Home / Travel policy. We therefore recognised that we really have 'one chance' to make the right impression and enable customers to feel the LV love!

One of our internal brand values is "treat people like family" (although not in the arguing like cats and dogs way!) and in the contact centre we really immerse ourselves in the spirit of this. Some examples might help:

## Our method: Give Agents a Voice

Many organisations measure the outputs of employee engagement. We do too, but invest our effort and time on truly encouraging participation from our front line – after all, they are closest to our customer’s experience.

As Director, at every site each month I always ‘plug in’ for some side-by-side call listening. This keeps me sharp, but more importantly people know I am interested, that I care and want to engage with them and the difficult role that they do. This simple act generates hundreds of thousands of pounds a year in ideas generated by agents – because they know management are listening.

Following call listening – coffee chats are also religiously employed – both with agents as well as team leaders and managers. 3 years on I can honestly say that no single meeting has passed without another ‘light-bulb moment’ emerging. We explain to our people that if they are sitting there thinking to themselves “Why On Earth do we do that?” then they must tell us their ‘WOEs’ as we want to make calls easier, not more difficult!

Now this is very obvious stuff – the point is, how many contact centre managers still do this with energy? Naturally enough, my senior regional managers are always keen to ensure that any issues are surfaced and dealt with before I find them... not in a big brother way, but we have lots of fun with this competitiveness, and our people are the ones who benefit. This also ensures that all levels of management are engaged with our first line.

We work on the principle that “if this was your business and your money, what would you do?” Simple enough, but when religiously employed in a disciplined way it is very powerful, and leaves no place for team leaders and middle management to hide! We’ve calculated that losing an agent, for whatever reason, costs us circa £7k (in recruitment, training, etc), so why would we then not treat them like royalty?

Another value we have is ‘sharp with a heart’: we want the behaviours of a mutual combined with the performance of a PLC (so we’re certainly not soft on our people!). We recruit for the right attitude in our people, and when colleagues ‘make the grade’ and get the LV= way we put them first. We are tough (firm but fair) when standards are missed, as these spread and dilute results, preventing us from achieving our goals.

There are many other ways for our people to share their issues and ideas:

- My Recognition
- Ask the Exec
- Department half-year Roadshows
- End of Year GI Roadshows
- ‘Open Mike’
- LEAN process reviews: groups of agents advise as subject matter experts
- Staff engagement annual survey

I am immensely proud of the fact that 90% of the improvement initiatives on our 3 year Business Improvement Roadmap have come from us listening to our people.

The commercial benefits are incredible: 3 years ago we set ourselves an ambitious target of reducing our cost-expense ratio 25% over 5 years (without technological improvements!) Through engaging effectively with our people we are now on track to deliver a 35% reduction!

Whilst this helps us re-invest our savings to keep premiums low for customers and improve retention rates, the absolute best thing about this is the virtuous circle it creates:

### **Benefits to our People**

- Removes irritants from their jobs
- Removes annoying duplication (also saves us time on calls and money!)
- Time saved from calls can be ploughed back into training and coaching
- Improves morale through feeling of engagement and making a difference
- Improves staff retention (again, saves us money!)
- People feel they can make a difference , and look for careers internally
- Gives us the 'voice of the customer'

### **Benefits to our Customers**

- All of the above have a positive impact for our customers
- More experienced, motivated and empowered people to answer calls
- Quicker, more effective processes – making us easier to do business with
- As we treat our staff like family - they then pass this treatment on to our customers

### **Benefits to our Business**

- £7m saved through agent generated initiatives in the last 3 years.
- Income up
- Conversion up
- Policy retention up as savings reinvested
- Products designed following front-line and customer feedback

One final example is below, to highlight how this approach makes our staff feel empowered and able to go the extra mile:

Our customer was stranded in a remote car park following a car accident, and called us from a near-by phone box. James, our agent, dealt with the call following our usual process and assured the customer we would be with them within 2 hours. However James was concerned that our elderly couple were left on their own without a method to be contacted on. He located their whereabouts using Google Maps and found a local pub, he called the landlord and using his charm persuaded the landlord to go and collect the couple and take them to pub to wait for our rescue!





## **Creating Brand Ambassadors**

Prepared by Gallup Consulting



## Key Headlines

- Brand ambassadors are employees who consistently deliver on an organisation's brand promise, thereby creating high levels of customer engagement
- Most organisations have too few brand ambassadors, particularly in customer service roles.
- Strong brand ambassadors possess the right talents for their role, are highly engaged, and are knowledgeable about their organisation's products and services.
- All organisations, by either design or sheer luck, employ some brand ambassadors; the key point is to find out who they are and hire more like them.
- Creating and sustaining strong and consistent brand ambassadorship in contact centres requires both *transactional* and *transformational* interventions.

## Executive Summary

*Brand ambassadors* are the employees who fulfil and carry out your organisation's brand promise for your customers. Unfortunately, organisations cannot assume that their contact centre and other customer-facing employees automatically embrace the organisation's brand promise.

Most organisations invest significant time and money in developing a compelling brand promise and communicating it to potential and existing customers. However, a compelling brand promise is only enough to initiate a new customer relationship. To sustain – and grow – this relationship, it is essential to create and deliver a coherent and consistently engaging brand *experience*.

The greatly increased acceptance of, and desire for, automated self-service channels in the last ten years means that the role of the contact centre agent has shifted substantially for most organisations. The nature of many customer-agent encounters is now more complex and emotional, even if call volumes have tended to decline for many (though not all) organisations. The customer-agent encounter has thus become a "moment of truth" that will either help fulfil the customer's brand promise expectations or dash them to pieces.

Contact centre agents need more than ever to be brand ambassadors in order to carry out the all-important mission of brand promise delivery.

In a recent Gallup study in the UK, only 38% of UK employees strongly agreed that they know what their company stands for and what makes their brand different, compared with 41% in the US and 46% in Germany. UK employees scored even worse when it came to being proud of the quality of their company’s products and services (31%) and advocacy of their company’s products and services to friends (27%). Clearly there is much progress to be made in all three countries towards creating more brand ambassadors.

### Who’s “Living” the Brand Promise?

	Employees (% Strongly Agree)
“Know what company stands for; what makes our brand different”	38% (UK)
	46% (Germany)
	41% (US)
“Extremely proud of quality of company products & services”	31% (UK)
	32% (Germany)
	35% (US)
“Encourage friends to purchase/ use our products & services”	27% (UK)
	42% (Germany)
	30% (US)

Source: Gallup Surveys: UK '08; N=1942; US Gallup Panel '07; N=3069; Germany '08; N=1895

The UK study also showed that executives were much more likely to know what their company stands for (58%) compared with non-managers (35%), and were more likely to be extremely proud of the quality of their company’s products and services (40% vs. 29% for non-managers) – though these figures are shockingly low considering the senior level of the respondents.

### Who’s “Living” the Brand Promise? (UK Employees)

	Employees (% Strongly Agree)
“Know what company stands for; what makes our brand different”	58% (executives)
	39% (managers/supers)
	35% (non-managers)
“Extremely proud of quality of company products & services”	33% (retail)
	31% (financial institutions)
	29% (non-managers)
“Encourage friends to purchase/ use our products & services”	40% (executives)
	30% (manager/supers)
	29% (non-managers)
“Encourage friends to purchase/ use our products & services”	28% (retail)
	13% (financial institutions)

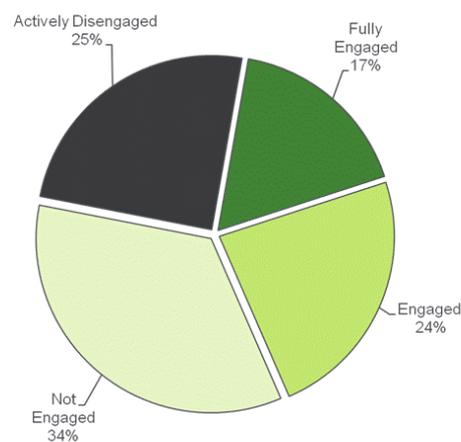
Source: 2008 Gallup Survey; N=1942

Successful brand ambassadors possess three vital qualities:

- **Motivation:** They are highly engaged.
- **Information:** They are very knowledgeable about their organisation’s products and services, how they compare to the competition, and how they apply and are meaningful to individual customers. They are the “thinking people” in the contact centre.
- **Pride:** They are passionate advocates of their organisation’s products and services, and of their employer as a place to work.

Gallup’s research shows that employees who are highly engaged, knowledgeable and proud to represent the products and services of their employer create *fully engaged* customers, based on Gallup’s CE<sup>11</sup> customer engagement metric.

## CE<sup>11</sup> reveals four types of customers



### Fully Engaged

Strongly attached and loyal; your most valuable customers

### Engaged

Emotionally attached, but not as strongly

### Not Engaged

Emotionally and attitudinally neutral; no positive association

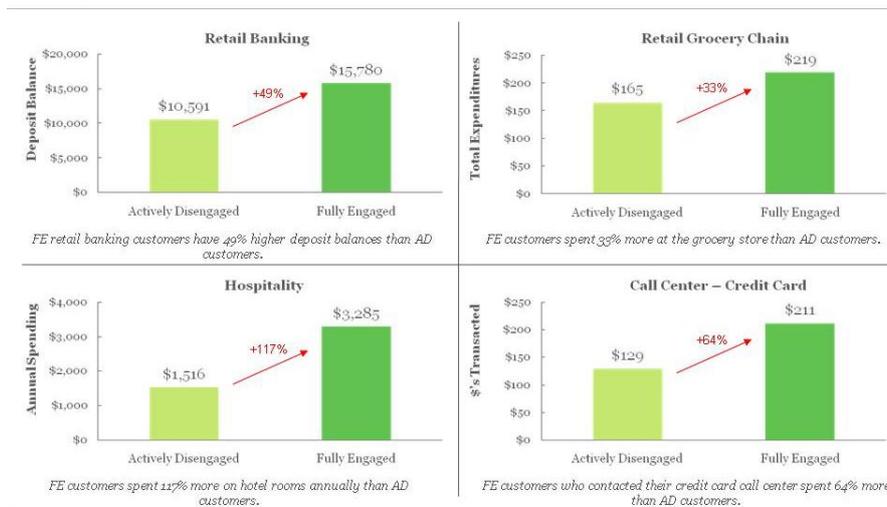
### Actively Disengaged

Active emotional detachment and even antagonism

## What is the value of a fully engaged customer?

The examples in the chart below show examples based on customers in retail banking, grocery retail, hospitality and credit card services. Each example below shows a substantial difference between fully engaged and actively disengaged customers on performance measures such as deposit balance and total customer spend.

## Engaged customers are valuable customers



Ultimately, brand ambassadors are important *everywhere* in your organisation. However, they are most critical within customer service operations where employees are communicating with customers every minute of every day. In customer-facing roles generally, and particularly in customer contact centres, maximising the number, intensity and consistency of your organisation's brand ambassadors is essential – assuming that customer engagement and its benefits are important to your organisation's success.

Although requiring a significant level of commitment to achieve, implementing a robust brand ambassador strategy provides organisations with meaningful business benefits and offers true, sustainable competitive advantage.

So what are the key ingredients of a brand ambassador strategy? The creation and deployment of contact centre brand ambassadors comprises the following phases of both *transformational* (phases 1 to 4) and ongoing *transactional* (phase 5) interventions:

1. Measurement of agent performance against customer engagement and performance measures, and the degree to which agents understand and embrace the organisation's brand promise.
2. Identification of the talent profile of consistently top-performing agents (based on customer engagement measures).
3. Identification of critical brand knowledge gaps and development of targeted training and coaching interventions to provide agents with essential knowledge about the organisation's brand promise and insights into how they can deliver on this promise more effectively.
4. Deployment of a talent-based hiring process to recruit agents who possess the talent to be strong brand ambassadors and consistent builders of customer engagement.
5. Implementation of consistent measurement of employee and customer engagement at the team or agent level, supported by focused coaching and training for supervisors and agents.

## Who are your engagers?

Assuming that you are not creating a customer contact centre from scratch, the first step is to figure out who your top performers are. Which teams and individual agents achieve the most consistent levels of customer engagement? And how does this translate into measures such as customer loyalty, overall value or profitability? If you are able to identify high performance contact centre teams, find out who these teams' managers are and what are they doing differently.

In order to know who is engaging your customers consistently, it is vital to deploy a robust customer engagement metric that both correlates to business outcomes and is actionable at the individual and team level.

## Top performer talents

Once you've identified those agents who consistently delight and engage customers on nearly every call, the next step is to understand the unique combination of talents possessed by these people that enables them to create high levels of customer engagement.

*Talent* is the first and perhaps most important element necessary to build brand ambassadorship: Gallup defines talent as a recurring pattern of thought, feeling or behaviour that can be applied productively; more simply put, talent is what a person *will* do, not simply what he or she *can* do. It is the difference between performing a service or task by instinct instead of following a script.

## Mind the gaps

Identifying the optimal talent profile is essential to ensuring that agents and supervisors are in the right role and possess the innate qualities required by the role. However, talent alone is not enough: Contact centre agents and supervisors need to understand the products and services offered by the organisation, what customers' expectations of them are (as defined by the brand promise), and how they are differentiated from competing or alternative products or services.

Most organisations include product training as part of their on-boarding process for new hires. However, over time critical brand knowledge gaps are created as products and services evolve and as experience levels become more uneven due to new hires joining more experienced agents. In addition to these basic knowledge gaps and inconsistencies among teams and agents, it is also common for the brand promise to become muddled and perhaps forgotten altogether by agents, even though they are supposedly tasked with delivering against this promise day after day. Also, the marketing department may frequently alter the brand promise to make it more compelling and attractive, or create different brands or service levels aimed at appealing to specific consumer segments – but without keeping customer service in the loop or up to speed on these changes and their impact.

This phase should begin with an audit of the product/service and brand knowledge across your contact centre operations, in order to identify the critical knowledge gaps. Based on the results of the audit, a targeted training and coaching programme should be deployed to ensure consistent, accurate brand knowledge across the customer service organisation.

Not surprisingly, the “thinking people” among your contact centre agents will be those who will benefit most from training and coaching. These individuals are likely to be in your top performing group of agents already.

### **Build a talent pipeline: Hire more like your best**

Integrate a talent-based selection instrument that will identify potential brand ambassadors into your agent and supervisor hiring process. The instrument or instruments will be based upon the talent profile of top performers in your organisation that was defined in phase 2. The objective is to identify the brand ambassador “thinking people” candidates up-front in your hiring process.

The creation of a talent pipeline will serve, over time, to literally change the DNA of the contact centre, transforming it into a bastion of brand ambassadorship. By hiring agents and supervisors who match the optimal talent profile – and who are likely to become, respectively, strong brand ambassadors and effective, engaging supervisors – this will set the organisation up for success over the long term. This transformational intervention will serve to establish clear competitive advantage that is difficult for competitors to replicate.

### **Measure and maximise team engagement**

Consistency is the key to optimising the customer experience, and the most effective way to both squeeze the performance curve and shift it to the right is through a holistic employee and customer engagement programme.

The starting point for this programme is deployment of a robust set of metrics to quantify customer and employee engagement. Employee engagement must be measured and reported at the team level, and frequent measures of customer engagement (e.g., monthly scores with frequent qualitative feedback) should be reported at the team and agent levels. However, engagement surveys are only as effective as the actionability of the feedback they offer to contact centre agents and supervisors (as well as to senior management). Further, both employee and customer engagement measures should serve as leading indicators of future performance. A set of ongoing, targeted coaching and training interventions designed to help agents and supervisors enhance their level of brand ambassadorship should be deployed consistently throughout the year. Further, these must be differentiated according to the needs of the agents and teams in question.

## Conclusion

Organisations seeking to boost customer service quality and financial performance should strongly consider the brand ambassador model. Implementation of this model consists of a series of transformational and transactional interventions designed to raise the level and consistency of performance across large customer service organisations. Brand ambassadorship enables the creation of sustainable, long term competitive differentiation that is difficult for competing organisations to replicate.

## Footnotes

*Your Brand Is in Their Hands* by William J. McEwen – Gallup Management Journal, 15 April 2010

*Can You Still Win With Service?* by William J. McEwen – Gallup Management Journal, 10 November 2010

*Who Are Your Promise Keepers?* by William J. McEwen with Jennifer Robison – Gallup Management Journal, 08 November 2007

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## **Achieving magic through a more holistic people strategy over the next decade**

Prepared by Bright



## Executive Summary

Over the last decade, the industry has experienced extreme movements in both attitude to and performance by staff and correlations between the two have often been counter intuitive.

However we now see a more stable focus on both KPIs such as number of training days, agent v. team leader ratio etc., as well as an increased interest in employee engagement and customer satisfaction as opposed to only looking at productivity metrics. This started around 5 years ago and has not stagnated despite cost cutting programs during the recession.

Companies are starting to realise that staff engagement drive both CSAT and productivity as well as taking a wider view of what actually drives that performance and therefore bottom line.

Furthermore, at all seminars we have spoken at lately, we have seen an overwhelming number of engaged and ambitious contact centre managers turning up to enthusiastically discuss improving our industry by focusing more on staff. Based on this we believe we will be able to considerably raise the game for our industry because, as we will show, this is the key to many of our industry's problems. There are still big challenges ahead though which we will outline in this paper, as well as how to tackle them and what the outcome will look like.

## Key headlines

- The actual value of staff engagement
- Baseline 2010 and where we need to go.
- How we will get there.
- What the top performers do differently.
- Technology v. People

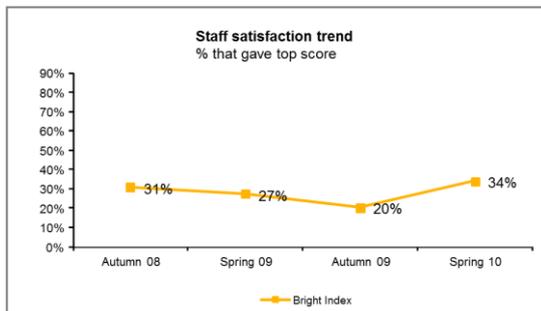
## Staff engagement; why should we care?

Gartner, Bright et al have proven that there is a direct correlation between staff engagement and customer satisfaction and eventually bottom line. This is hardly surprising, as consumers we understand that all companies can get things wrong but if they show accountability, empathy and true willingness to solve our problems, we remain loyal. Over the last few years however, we have seen that staff engagement is an even more important metric than previously thought. By measuring service levels in parallel with customer satisfaction we see that for example 30 seconds longer hold time (which is still the key quality metric for a majority of centres) has almost no effect on CSAT whereas only a small drop in perceived engagement by the customers (which in turn only a handful centres measure) sends CSAT through the floor. It is when linking engagement and productivity things start getting really interesting though.

When shown proof of direct links between engagement and productivity, organisations start to listen. A positive and proactive agent will take new targets on board and try and reach them, have less absence, solve problems themselves (and thus increase FCR), etc. They have to be given the mandate to be a proactive problem solver though, which is often not the case.

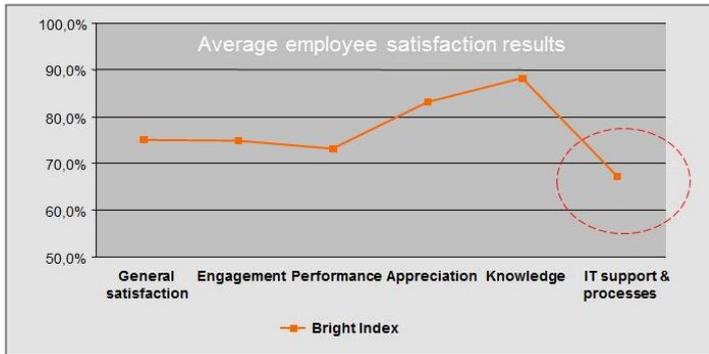
The simplest way of making organisations (whose centres sell products) pay attention to the power of engagement, is to show the correlation with conversion rates; the link is crystal clear.

### 1. So, what does our baseline really look like?



Let us start with looking at general satisfaction and motivation amongst staff.

The graph to the left shows percentage of employees rating their satisfaction with their contact centre employer “very satisfied” (based on the Bright Index 100 annual participants).



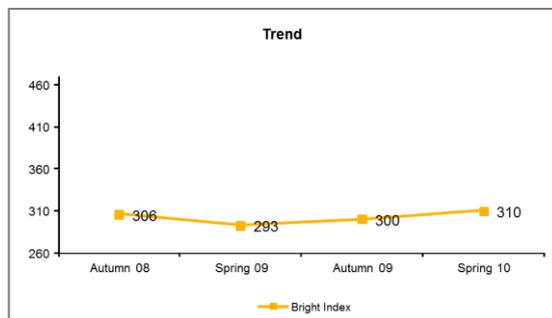
The reasons for the previously downward trend varied from company to company but the area “Support & Processes” was, and still is, by far the area that still gets the most negative feedback across the board. Over 20% say that the technology in place actually hinder them more than help them in their work.

The trend was also a due to a mindset fuelled by media and commercials portraying call centres as the dark coal mines they rarely are. A lack of appropriate staff is a third reason the results are not better, 15% say they do not enjoy talking to or helping customers and should frankly never have been hired.

Salaries have decreased across sectors during 2010 but we do not see a causal correlation between this and staff engagement. The top drivers are instead:

- Achievement
- Recognition
- Development

Why the broken trend? It is too early to determine the cause but we see a number of correlations.



The graph to the left e.g. shows average duration of answered calls. A direct result of more and more people throwing out AHT as a KPI over the last 18 months and focusing more on driving the outcome of the call. Something that we hear in interviews with agents is appreciated. They don't have to try and hang up or hurry the customer along in the call and can focus on more relevant objectives such as CSAT, FCR and sales. From a management and resource planning perspective, AHT remains an important metric but it should not be seen as a KPI that agents are incentivised on.

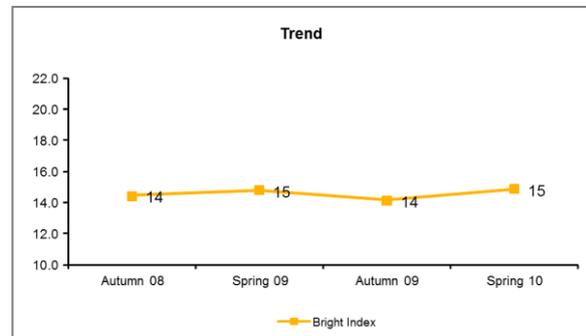
Due to new CSAT solutions many agents now get instant feedback from the customers on how they are doing individually, something that boost their confidence and pride in their performance.

## What do top performers do differently?

When taking a look at what the top 25% overall performers are doing differently, a couple of things stick out.

- **Agent v team leader ratio.**

Contact centres with team leaders that manage between 8-15 agents outperform others on almost all of the major KPIs. Above 15 all results drop significantly and below there is no additional gain. The graph to the right shows industry average remaining dangerously close to the breaking point of 15 agents.



- **Finding service level breaking point.**

By measuring how long customers actually are prepared to wait instead of guessing, service levels can be turned down and freed up time can be used to drive metrics like engagement that matters more.

- **Break down CSAT to drive change.**

Top performers do not settle for their organisation's generic, brand focussed, CSAT surveys, they make sure they can measure it on a team or ideally agent level, hence make it accountable and drive change. They also feed it back to the agents making it a self-developing tool.

Above all they find out the facts; what are the actual drivers of their strategy and how do different KPIs drive each other? And when they see the links they realise that staff and staff engagement are at the heart of a majority of their objectives.

## Technology v. people

Is Self-service good or evil? Well consumers continue to get irate by badly scripted IVR solutions. However, when we looked at the top 25% CSAT performers in the Bright Index, they had a significantly higher level of self service. Their solutions were well designed though and always had the option to speak to a live agent.

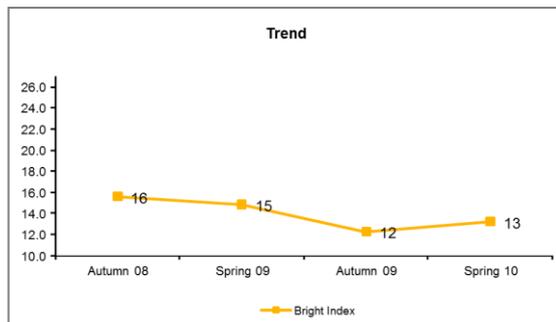
Service desks can have up to 70% calls regarding password which with voice biometrics (staff are identified by their voice and password is reset) can be erased, leaving the staff to handle more complex queries.

*It is not about going "back to basics", rather "forward to basics" as we never got it right the first time around.*

A US company is having great success with personality matching based on a combination of voice analytics and demographic analysis. A customer calling in is immediately categorised based on their voice and routed to the agent most likely to have good rapport with the client.

Like everyone else, we're excited to see what will happen with speech analytics, social media, voice biometrics etc. over the next few years. What we most of all are hoping will happen though, is that more centres will start using their existing technology properly. It is not about going "back to basics", rather "forward to basics" as we never got it right the first time around. For example:

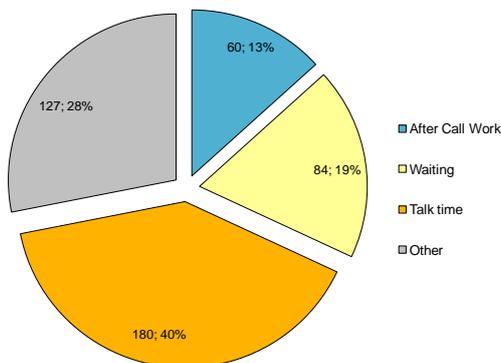
- Finally getting multichannel right:**  
 the average time for responding to an email is still almost over a day (see graph to the right showing average response time in hours), a situation an increasing number of customers just won't accept.



- Measuring the relevant things in systems:** stop measuring default metrics in ACDs.
- Evaluating systems through agents:** a majority of them think that the systems in place hinder rather than help them do their job, ask them why!
- Call cause measuring:** A majority of centres still do not have a structured way of measuring why customers are calling (and as a result cannot do route cause analysis).
- CRM and CLI:** it has been around forever yet how many times haven't we all had to repeat information we've given twice already?

### What more do we need to do to drive change this decade?

As mentioned previously, a more holistic performance management will show that staff is key to companies' strategies and this will increase their focus and spend on people. We now need to build business cases around what the benefits will be from e.g. decreasing the agent per team leader ratios, increasing the number of training days, AHT and other things that might cost more short term but with significant ROIs long-term.



When looking at the reasons for dissatisfaction in our engagement survey, most negative comments are around communication, recognition and involvement.

The one single area that scores the lowest is systems. Still after 20 years, agents feel contact centre systems in place hinder them more than help them in their work.

Something that is reflected in the average dispersion of an agent's day; we are still just getting 40% talk time out of a full day.

## Summary

Companies need to apply a more holistic way of measuring what actually drives their strategy. When seeing that staff is at the heart of reaching key objectives, they will focus more on what staff need and how we can help them delivering cost efficient great customer service.

The results for our industry, as proven by current top performers, will be a giant leap in effectiveness.

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**Empathy in the new contact centre  
Employing and measuring human skills – building trust and  
serving customers better**

PREPARED BY HARDING & YORKE



## Key Headlines

- It's not the people or the model we need to change; it's the way we measure and manage. Behaviours are as important as processes.
- We need to demonstrate empathy in our management of agents if we expect them to show empathy to clients
- Fear - and desire to deliver consistency – result in over-control and disempowerment
- Agents who don't feel trusted or empowered are unlikely to make customers feel trust in the organisation they work for
- We need to consistently implement all the good practice we already know about – involving people, recognising positive behaviours, removing barriers and punishments and providing regular, supportive behavioural coaching.

## Executive Summary

Who needs a new model? The issue as I see it isn't that we don't need to change the agents we have – we already employ good, intelligent people who are capable of the complex tasks we ask them to carry out. The problem is the way we measure, target and manage those people. Despite all of the knowledge that has been shared within the contact centre industry over many years, showing the power of involvement, coaching, empowerment, positive reinforcement, call listening, relationship building, etc etc, we still frequently meet contact centre managers who use quality monitoring as a punitive tool, coaching as a remedial rather than a development activity, and believe that the way to change behaviours is to apply sanctions rather than rewards. A focus on inputs (positive and professional behaviours towards the customer) will produce the outputs you seek; a focus on outputs may not result in the behaviours you desire.

## Who needs a new model?

Despite all the research and learnings that have been readily available to contact centre planners and managers for more years than I can remember, I am still amazed at the way that seemingly intelligent individuals seek to motivate and manage others. If anything, it's our organisational structures, processes and management practices that need to change rather than the contact centre agent. It seems to me that we don't need yet another model or new idea – we just need to use what we know already. And to employ a bit more of what is apparently one of Man's unique attributes, which has recently started to appear in many organisations' lists of company values: Empathy.

## Empathy for our people

Everyone knows that Empathy is important – although many people mistake it for 'sympathy' or think that it's about being 'lovey-dovey' or 'over the top'.. . In truth, Empathy is one of the most powerful interpersonal tools; if we are truly empathetic, we can put ourselves in the other person's shoes, appreciate their situation and respond appropriately. As customers, we recognise and value it, and know when we're shown it. The issue seems to be that we find it hard to manage people with empathy, or to recognise sufficiently those who demonstrate it at work; we're still fixated on the measurement of 'hard' outcomes rather than the management of the skills that allow us to attain them. And if we don't show empathy to those who work with and for us, how can we expect them to be engaged, to feel and inspire trust, and to show empathy and understanding to others – all essential if we are to respond to and meet the demands of the 'mobile, connected, informed and opinionated customer'?

Let me give you an example. In a recent client meeting, we were discussing how best to change the 'feel' of their telephone interactions with clients, in order to improve relationship building, increase success rates and reduce repeat calls. We'd established that the current bonus scheme was designed to reward compliance (or rather, punish non-compliance); and that conversations with clients were largely lacking in empathy, energy, warmth and drive, making it harder to achieve positive outcomes. 'I know', said the Quality Manager, 'we don't have many questions on interpersonal skills in our Quality Form at the moment. Let's add some more questions about Tone of Voice and relationship building, change the scoring so we have more points for how they come across and then take their bonuses away if they don't do it. That should do the trick.' Really?

Most of us are pretty meticulous when we select a new employee. It would be quite alarming if we chose someone who was unable to string sentences together, had absolutely no interest in offering customers a decent service and was determined to be miserable and/or confrontational for the entire day. And let's face it, it shouldn't be all that difficult to hold a civil conversation with a customer and to tell them what they need to know and/or help them to sort out their problem with the aid of our knowledge of our organisation, its products and its services. And if something goes wrong, our parents and teachers taught us that it was polite to say 'sorry' and mean it – so why do we make it all so difficult?

## Trust and control

Trust is one of the keys to this. Our culture of strict regulation and over-control stems not only from a desire for consistency, but also from fear and mistrust. At an organisational level, this is due in large part to some organisations' lack of control in the past (mis-selling of pensions and mortgages; hard-ball sales techniques etc.); at an individual level it's often a product of a blame culture where managers are held responsible (and take the fall) for any mistakes made by those who report to them. But the way we handle this is producing a different problem which is in turn leading to further mistrust: if we tie Advisors' hands so tightly that they can't move for fear of falling foul of the rules, we might as well use robots to answer the phone.

Most of us have removed formal call scripts, but many have replaced these with even more complex sets of rules that result in more or less the same thing: standard forms of words that will pass all the 'quality checks' and minimise the likelihood that the individual employee will go onto a 'performance plan' (bad), get 'feedback' (usually bad) or 'extra coaching' (also bad). Our desire for consistency and professionalism has morphed into a 'Stepford Wives' scenario where we try to make everyone behave in exactly the same way, instead of what we really want, which is for them to respond in a consistently friendly and professional way, using their own personality and judgment. We resort to formulae rather than working a bit harder to impart proper understanding of, and an ability to use, relationship-building skills. And we get what we design – a formulaic feel to our interactions, and people whose personalities aren't required, who don't feel trusted and who become disengaged. As a client commented to me a few years ago, 'we recruit all the right people, with positive attitudes and warm personalities, then we spend years training and managing it all out of them'.

## It's not what you do.....

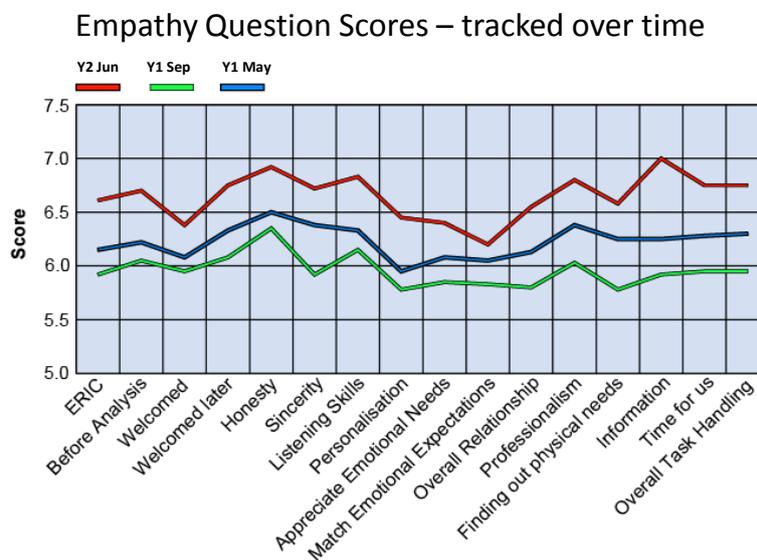
You can't give people a 'one size fits all' formula for empathy. In a recent visit to a client's contact centre, I noticed that in almost every call, Advisors were asking the customer 'And how are you today?'. Perfectly pleasant, except that the phrase seemed often to be shoe-horned into the conversation at an incongruous moment rather than relating to anything that had been said before, and the if the customer responded to the question, their answer was often ignored or given at best a cursory acknowledgement. When I enquired why they asked the question, advisors told me that they would fail their call quality checks if they didn't 'engage in non-business conversation with the customer'. It's a bit like telling people to use the customer's name to personalise the call (in one case this had been translated into 'use the customer's name more and it will feel more personalised' – how does 21 times in one call sound?). It's not what you do, it's the way that you do it!

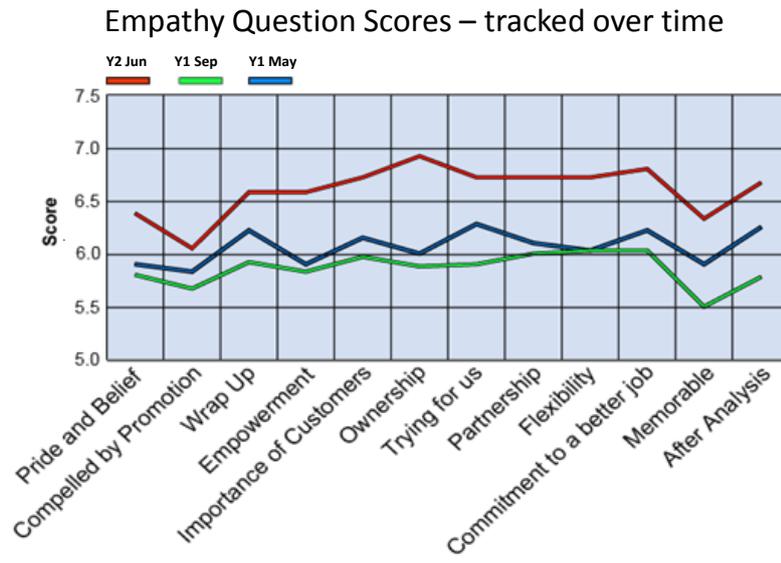
## Moving forward

So what's the solution? Empathy begins with respect. We need to engage our people on their terms as well as ours – again, nothing new required here. The people we employ are individuals with individual personalities and situations, just like our customers. We need to recruit for personality, attitude, intelligence and adaptability – harder to develop than technical skills and knowledge, which can be learned. Another relevant example here is one of my clients in Switzerland, who has discovered that some of their best technical support people have a background in hotel management – they have a highly

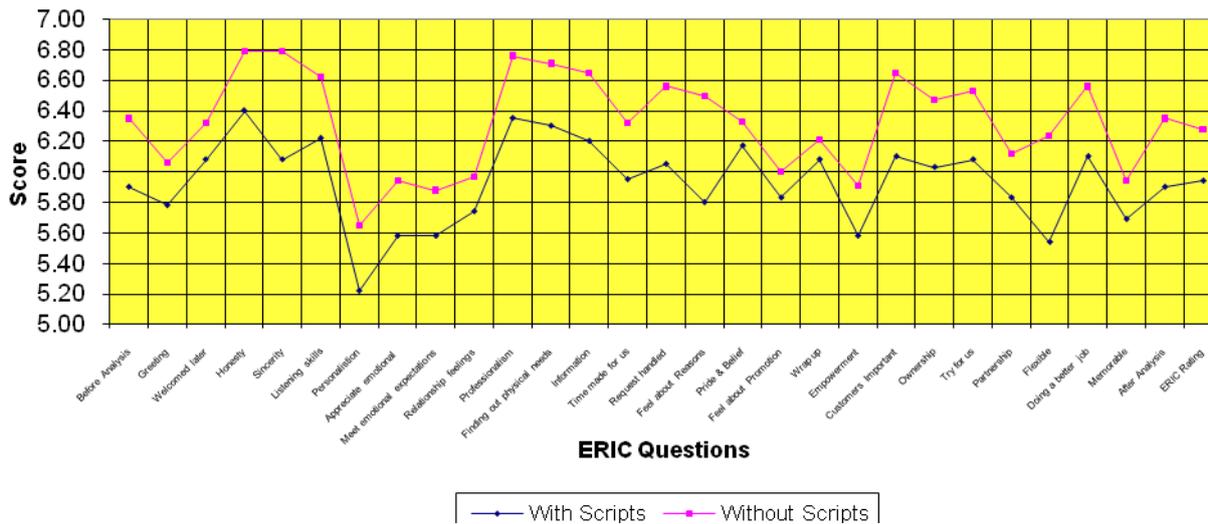
developed sense of customer service and can quickly learn to navigate the system that helps even the most experienced technical experts to deliver accurate information to clients. What we see less of are really well designed behavioural measures – people tend to shy away from these because they are seen as ‘subjective’ and a potential source of disagreement. Hence the rather formulaic approaches mentioned earlier.

Many organisations’ attempts to improve their customers’ experiences focus on process and systems redesign, or outputs (sales, repeat calls, AHT) and ignore or avoid tackling the trickier area of agent behaviours, even though it’s the latter that need to change if we want different results. However, there’s only so much you can do with a system or a process, as has been shown by the enormous amounts of money wasted on failed CRM systems. The graph below shows the results of research we did for one of our clients: we measured the customer experience three times using our validated ERIC™ analysis (academically proven to correlate to profit) - after our initial feedback, they did some work on process improvements, with very little effect (in fact, a slightly negative one) on the experience; after the second round of feedback, they undertook an intensive coaching programme, focussing on behaviours and relationship building skills. The results were outstanding- not only did they achieve all their business performance targets, but the customer experience was transformed. If you tell people to reduce AHT without showing them how, they will just talk more quickly or rush the customer off the call; if you coach them on how to assertively guide the conversation, the customer will still get a positive experience and the result will be the optimum call length.





The graph below shows the effect on the customer experience of removing scripts in a telephone banking environment:



Biggest areas of improvement in terms of how the agent came across to the customer were: honesty, sincerity, listening skills and flexibility – at least 3 of these being key contributors to the building of trust.

## Things that work

From experience with a whole range of organisations, things that I have seen make a tremendous difference are:

- involving Advisors in designing quality standards
- making sure standards balance all the skills and behaviours rather than majoring on compliance and knowledge related content
- making measures into performance development tools and means for celebrating and rewarding excellence, rather than instruments of fear and punishment
- removing scripts and compulsory forms of words
- removing 'autofail' elements and allowing that people are people and sometimes make genuine mistakes
- regular, off-line coaching for all agents, involving listening to and discussing recorded calls and/or e-mails
- secondments into quality and coaching roles.

These are all things that generate and nourish a culture of trust and positivity, generating an environment where people enjoy coming to work – and treating your own people in exactly the way that you would like them to treat your very demanding, discerning (and savvy) customers.

## How would you feel?

Would you be motivated by a manager that set draconian rules, listened to everything you said and commented only on what you did wrong, asked you to behave differently and then promised to punish you if you didn't? Or would you thrive better if your manager allowed you some space to be yourself, build relationships and use all your skills? Have a little empathy.....

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# **Making it real: Using teams to transform contact centre operations**

PREPARED BY HORIZON2



## Key Headlines

- When working with multiple people, performance has as much to do with how they work together as it has with their individual abilities
- Contact Centres currently pay little or no attention to this aspect of managing their employees
- Most so-called contact centre teams are in reality pseudo-teams, few are real teams, and fewer still are high performance teams
- There are big gains to be made by converting current pseudo-teams into real teams with merely “reasonable” team dynamics
- There are potentially even bigger gains to be made by developing these real teams into high performance teams



## The case of Smart Bank UK and their Contact Centre for the 21st Century

In late 2010 the UK's newly established Smart Bank began planning their new contact centre. They realised that contacts from their customers would present a demand profile that was increasingly at odds with the way that current contact centres were configured, staffed and operated.

They decided to take a "blank sheet-of-paper" approach to designing their new contact centre, rather than the "me-to" approach of simply using existing models of how contact centres should be organised. Instead, they wanted to take a completely fresh look at how their contact centres might operate, with no limitations imposed by legacy systems and technology, preconceived ways of organising operations, or the time-worn habits of both managers and agents.

Their starting point was an understanding of the customer demand they would face when the new bank was up and running. And their solution was a design and way of running their contact centre that was unfettered by the limitations of conventional contact centre operations.

Their starting point was a realisation that the profile of calls that their agents were going to be dealing with were, relative to the kinds of calls that contact centres had traditionally dealt with, rather different. The reasons why customers would want, and need, to speak with an agent (usually but not necessarily in real-time) would be different, and the kinds of customers who would want to talk with agents would be very different to the current call and customer profile.

Their intention and expectation was that the vast majority of simple customer transactions, approximately 80% and likely to increase further, would be handled by various self-service channels within the contact centre, such as the web, mobile applications and SMS, and touch-tone or voice-enabled IVR. The contacts that customers would route to agents would be, compared with past experience:

- More varied, with lots of different and relatively unpredictable demands. The call profile would not be dominated by large volumes of a small number of simple, routine and highly predictable tasks
- More complex, with calls involving multiple and inter-connected tasks, involving tasks which were exceptional, and/or where previous attempts to deal with the task had failed or gone wrong.
- Bigger, so that resolving the tasks would be likely to involve multiple contacts, not only between the agent and the customer, but by the agent with other people within the organisation. First contact resolution would be the exception rather than the norm.
- Resolving these tasks would involve more heuristic problem solving approaches, and involve the agent in making judgement calls rather than rigidly following rules and procedures

- The calls would be more likely to have a significant socio-emotional component, either negative or positive, with the way the customer was treated being at least as important as the way the ostensible problem was handled.
- Similarly, the task and the response to that problem is more likely to be specific to the individual customer, with the relationship created and developed between the customer and the agent being a key outcome of the contact(s)

The customers who would be calling are also likely to be rather different to the current customer profile. They are likely to be people who prefer to talk rather than to read/write, who like and prefer conversation and contact with people to dealing with non-human machines. And they may be people who for one reason or another, short- or long-term, have problems with accessing other channels. Whatever the reason, they will be calling because of personal preferences and characteristics which will need to be recognised and responded to.

Although the systems Smart Bank will put in place will provide considerable support to agents to help them deal with the increased complexity of the tasks they will be facing, there is an acceptance that the role of the contact centre agent will require greater problem-solving, relational, empathizing and decision making skills to resolve customer issues. These agents will need to be managed in ways that are distinctly different to current management practices.

Current contact centre management has standardised around a quasi-mass production model, with each agent undertaking a very limited and highly specialised role, and with contact centres consisting of collections of large numbers of agents doing the same job, and separated from other people in the organisation responsible for other tasks and roles. Command and control management is used to organise the work of these agents, with centralised decision making determining the target processes, agent responses and resultant customer experience, with the aim of minimising process and response variability and maximising productivity.

One consequence of this way of operating are the very high levels of sickness, absenteeism and attrition, and the very low levels of engagement and morale that characterise many current UK contact centre operations. These impose a substantial operating cost on current operations, with large budgets spent on the recruitment and selection, induction, training and integration of new agents to replace those who leave, and limitations placed on operational effectiveness and efficiency by the absence, notified and unnotified, of those who are merely “present”.

The creators of Smart Bank’s new contact centres realised that the extent and consequences of absenteeism and attrition would be even greater in the kind of operation they wanted to create, and where the kind of agents they realised they needed as employees would be even more at odds with conventional contact centre management practices.

They realised that the kinds of agents they would be employing would be (more) difficult to find, and more expensive to train (with their training taking longer), and they were likely to take longer to achieve their full performance potential after graduating. The impact of a poor performing agent was likely to be greater, and the loss of agent (temporary or permanent)

likely to be greater, and more difficult to replace (due to the greater knowledge needed, not just in general but also of specific ongoing tasks)

To meet these demands, of attracting, retaining and making best use of agents, a key dynamic was the use of high performance teams, with the principles of effective team performance being a key part of their thinking as they designed their new contact centre.

Examples of high performance teams include sports teams (rugby, cricket, rowing; the crew of racing yacht, the pit crew for an F1 racing car) and teams operating in extreme situations (the crew of an RNLI lifeboat, of a rescue helicopter, a mountain rescue team) as well as though operating in more routine but still demanding environments (a surgical team in hospital, the crew of a roll-on/roll-off ferry, the chefs running a restaurant's kitchens, the members of a symphony orchestra, the cast of a play). In each case, the success of the enterprise is critically dependent not only on the individual skills of each member, but also on how those individual members work together.

A team can be defined as a group of people who:

- are more than two people, and may be up to fifteen in number
- have shared super-ordinate goal(s) (that is, they are not only goals they have in common and all are striving for, but they are goals which are only achievable if they work together, and which none of them can achieve if they work independently.)
- rewards and costs are shared and interdependent (that is, that my rewards are linked to your performance, and vice-versa. Team goals are always win-win within the team)
- frequently interact in order to achieve those team objectives
- activities are interdependent, with the ability of one person to perform their role being dependent on the ability of other people in the team to perform theirs)
- have different roles within the group, with different abilities, skills and expertise allowing them to perform those different roles
- have shared task norms (“ways of doing things”) developed by and specific to the group, and they share a “culture of the group”
- identify as members of the group (“we”), who are cohesiveness (stick together) and who have loyalty to the group. And the team will often have considerable longevity, with stability of membership and roles over quite long periods of

time. (The team may have taken some time after coming together to reach its current high level of performance, and recognises that changes to its membership and structure are likely to have an adverse effect upon its performance.)

- Note that although a team will very often have a person who is designated as the leader, a team is not defined by whether it does or doesn't have a leader.

The designers of Smart Bank UK's new contact centre were aware not only of the theoretical potential of effective group working (teams can do more, can do things better, can do things faster, and can simply do things that no individual member can do) but they were also aware of the extensive research that shows the benefits in practice of effective team work.

For instance, research conducted by Prof Mike West and his colleagues (e.g. West 2003) shows that, in the UK's NHS hospitals, the extent of team working predicts the extent of employees' organisational commitment, their adherence to organisational rules and procedures, and the extent to which they co-operate effectively with their co-workers. It also predicts and underpins the quality of outcomes, such as patient mortality rates. And effective team working leads to enhanced individual and organisational innovation. So designing their contact centre around effective team work seemed to be an obvious way for Smart Bank to maximise quality and productivity whilst minimising costs.

They realised that current contact centre practices do not offer a good model for how to create and use teams. An examination of the so-called teams operating within contact centres suggests that these are teams in name only, in fact they should more properly be called pseudo-teams.

Pseudo-teams in current UK contact centres consist of groups of people who:

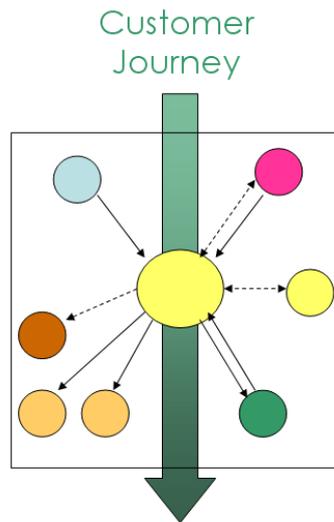
- are more than two people, may be up to fifteen in number, but are frequently bigger than this.
- do not share super-ordinate goal(s). Rather they share the same individual goals, but these goals can be achieved by any one member of the group irrespective of the performance of other people in the group
- the rewards and costs of one agent are independent of any other agent. And to the extent that they are interdependent they are likely to be competitively structured, so that if one agent "wins" then the other agents in that group cannot.
- Do not interact in order to achieve their objectives. They may interact socially with other group members, but their key work tasks are structured so that they can be done independently of any other group member. To the extent that they are dependent on other people to achieve tasks these people are usually in other groups (departments)

- activities are designed to be independent of one another, so that any one person in the group can perform their role whether or not any other person in that group is good at their job, or is even present at all
- all have the same role within the group, with people being selected and assigned to the group precisely because they have the same abilities, skills and expertise so that they can perform exactly the same role within the group
- do not have any unique shared task norms (“ways of doing things”). Rather how things are done is imposed from outside the group, and are common to many groups within the same contact centre.
- Don’t see their membership of the group as particularly significant, and who have little loyalty to that particular group. The team may have only a short-term existence, with frequent loss of members and the arrival of new members, and frequent re-allocation of people to different groups.

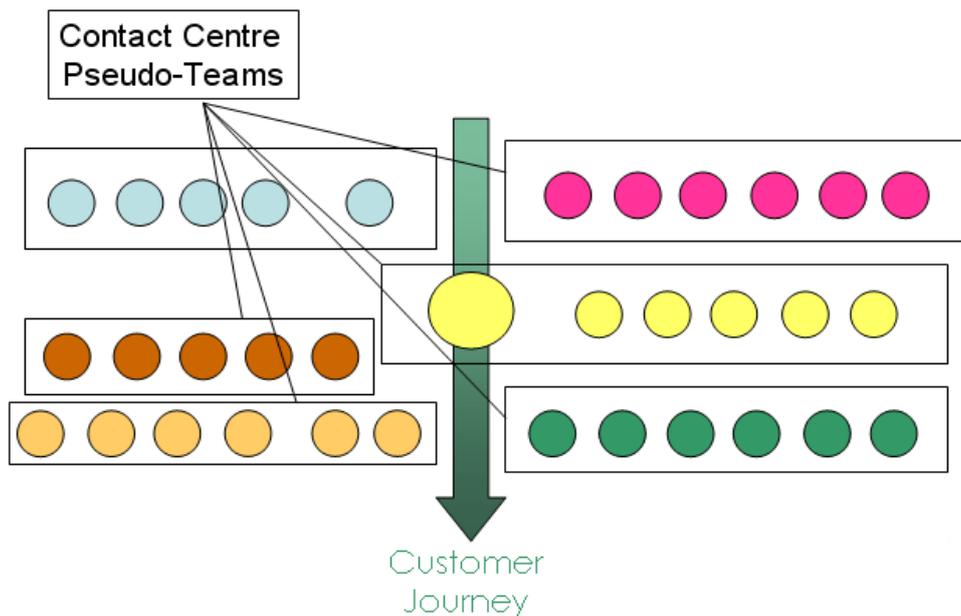
Pseudo-teams of this kind are a major element contributing to the inefficiency and ineffectiveness of organisations where they exist. Prof Mike West and his colleagues, in a study of 170 UK acute Healthcare organisations involving some 120,000 employees that people working in such pseudo-teams are significantly less effective and less efficient. People working in pseudo-teams make more errors, suffer more injuries, experience more stress and less job satisfaction than people working in real teams. And the more “pseudo” the team, the more inefficient and the less effective the team is.

Why do pseudo-teams generate such poor outcomes? One reason is that they absorb time and effort in activities that are associated with teams, but which don’t add to the productivity of group members. For instance, they will have team leaders, and team meetings, but these will be dealing essentially with the management of individuals qua individuals, rather than with the operation of the team as a team. Another reason is that, although they don’t provide any positive intra-group advantages, they do generate negative inter-group relations, which can be extremely harmful to the organisation as a whole. Social psychologists have pointed to the incredibly negative and destructive impact of inter-group conflicts. And their research has shown that these negative inter-group processes can be triggered by the mere labelling of people as belonging to one group rather than another. So pseudo-teams give rise to the most negative features of groups, without providing any of the benefits.

The first, and key decision taken by the Smart Bank designers was regarding the structure of the teams they would create. They noted that for many customer journeys an agent would need to contact and consult other people within the bank:

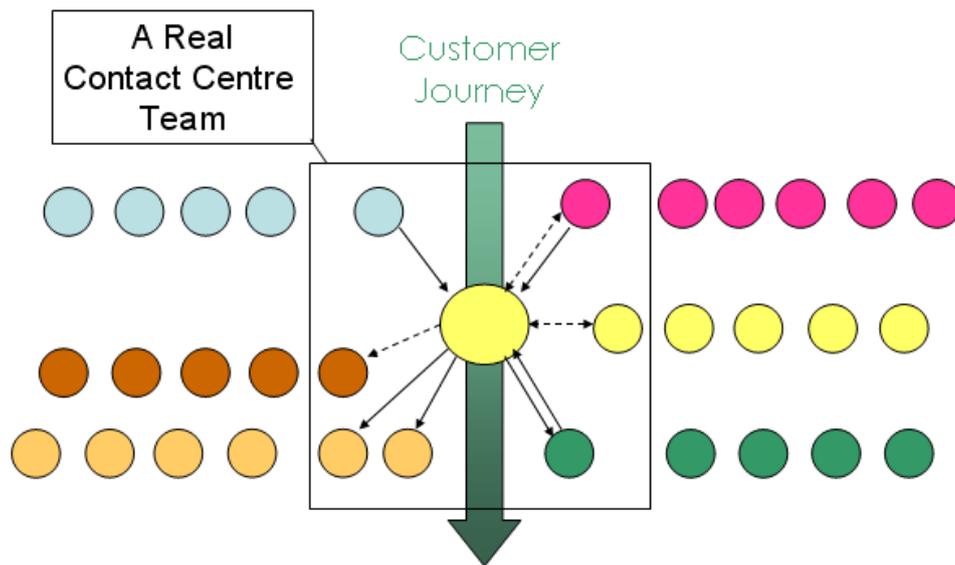


And they noticed that conventional team structures in contact centres focused on horizontal teams, consisting of people doing the same tasks:



In this set-up, customers, and the agent attempting to help them works across group boundaries

The designers of the Smart Bank contact centres decided to structure their teams “vertically”, putting together teams of people based on an analysis of the different kinds of people needed to optimally support interactions with customers:



Having made this critical first decision, the next step was to recruit and select the right people to staff these teams. As noted by Jim Collins in his book "From Good to Great" (James C Collins 2001) organisations need to "get the right people on the bus, sitting in the right seats". And in real teams this means selecting people who, although they are different to one another in terms of skills, expertise, and capabilities, and quite possibly in terms of personality and attitudes, they also need to get on well with one another.

The Smart Bank design team recognised that getting such teams to operate effectively would not only take time as they learnt to work with each other, but that support for the teams would be needed from experts in team-working, who would help the team to recognise and manage the "team level" of operation which is in addition to the normal concerns of managers with individual attributes and performance.

The characteristics of high performance teams are now well understood (see West 2003) and the benefits to be gained substantial and measurable.

## What makes a good team?

- A team vision (which combines objectives, tasks, approach and identity)
- Clear roles and role relationships
- Capabilities of individuals matched to role demands
- Good communication
- Team discussion and decision-making
- Frequent review and reflection on team process and performance
- Problems and conflicts addressed and resolved
- A readiness to review and revise team processes and structures

But for an organisation, such as a contact centre to stand any chance of benefiting from these potential benefits it has to recognise and be prepared to manage at the level of the team as well as to manage individuals. The designers of the Smart Bank's new contact centre accepted this, and took the brave, and fundamental decision to structure their contact centre so that teams were real, as compared to the pseudo-teams that are ubiquitous in the majority of today's contact centres.

The outcome of their initiative will undoubtedly be watched with interest by the whole of the UK contact centre industry.

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**Leading teams into the future**  
**Learning from the manufacturing sector**

PREPARED BY: CALCOM GROUP LIMITED



## Key Headlines

It is essential that we invest in the development of Team Leaders. The return on investment will be delivered both in the short-term and the long term.

Calcom's research has identified a number of critical areas related to current contact centre team leadership:

- A disconnect between organisation and Team Leaders
- Preoccupation with cost at the expense of value
- Team Leaders as a potential obstacle to change
- Performance in a vacuum
- Influence on customer focus
- Staff viewed as commodities
- A factory mentality

The manufacturing sector could show us a way forward.

## Executive Summary

UK contact centres face a dilemma between meeting the demand for tailored, personalised service on the one hand and for control, predictability and commoditisation on the other. Team Leaders confront this dilemma every day, and with organisations asking for both improved customer experience and reduced costs the demands of the role are increasing.

But can those demands be met using the current approaches to organising work and managing work teams?

Management techniques and practices in UK contact centres have been adopted and adapted from those of the mass production manufacturing sector, in which the goals were high volume, low variation and cost rationalisation. But the manufacturing sector has moved on to embrace new models ways of organising. Contact centres look set to follow, and this will have a radical impact on the Team Leader role.

In order to transform their effectiveness in an era of constant change and “mass customisation” organisations need a radical uplift in the amount of development and support they give to Team Leaders. This will be repaid in the short term by improved performance. But it is also a strategic investment in the future, the success of which is critically dependant on the Team Leader community.

## A current dilemma

There is a fundamental problem with what we ask contact centre teams to do and how we manage them. We want them to have real conversations with real people. We ask them to personify the relationship between the customer and the organisation in an effective way so both parties gain value from it. But we also want them to be like cogs in a machine – performing actions with minimal variation in performance, maximum reliability and predictable responses to the levers we pull. The messy, fuzzy, spontaneous nature of human relationships doesn’t sit easily with the desire for clarity, control and efficiency. Despite best endeavours, art and science often remain two cultures in the contact centre, rather than complementing each other.

In the crossfire of this conflict sit the Team Leaders or Managers, who need to manage teams to deliver against both the art *and* the science that are required. A lot rests on their shoulders. Yet, despite obvious pockets of excellence, as a whole this group remains significantly underinvested in with regard to skills, training and qualifications. This has to be addressed if organisations are to achieve their aims for improved performance, valuable long-term relationships with customers and optimised costs. Managed effectively the investment will not only generate short term returns but will equip the Team Leader community for the future.

Early findings from research carried out by The Calcom Group highlight some critical areas of current mismatch:

## Disconnect between the organisation and Team Leaders

Many Team Leaders often feel stuck. They want to make a difference, to contribute to the success of the team and the organisation; but they are immobilised by conflicting priorities and a pace of change that it is difficult to keep up with. Calcom’s research shows that change is accepted by the Team Leaders as a part of modern business; but its pace has increased for them recently, driven by massive organisational changes. These include radical restructuring, entry into new markets and new product streams, and a move away from manual processes towards online support for customers. In many organisations rationalisation elsewhere has led to changes in the Team Leader role. For example, Team Leaders are increasingly picking up HR and Quality administration duties, as departments dedicated to those functions are pared back or eliminated.

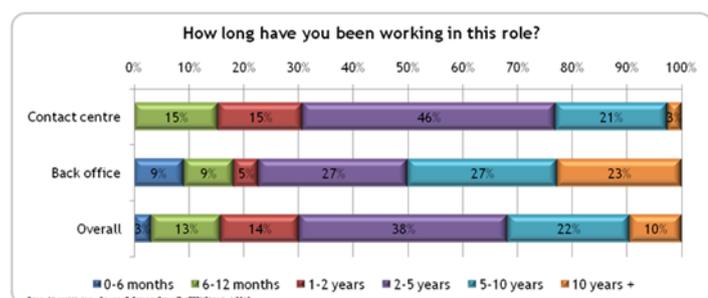
The research shows clearly that one of the vital missing ingredients is adequate communication between higher management and the Team Leader community. The result is a lack of alignment between the operational aims of teams and the strategic intent of the organisation, and a lack of context or understanding about the reasons for the changes that are taking place.

## Cost versus Value

An example of this lack of alignment can be seen in the preoccupation of Team Leaders with managing productivity and cost. While part of the organisation may commit to greater engagement and better relationships with customers, the performance of teams tends to be measured on productivity and cost savings, and this is a major component of the role of most Team Leaders. While managing these areas is vital, it appears often to be achieved at the expense of growing value for organisations through the development of outstanding customer relationships. This is not necessarily the fault of the Team Leaders; the way they are measured and the information they are given simply do not cover a broad enough definition of “performance”.

## Obstacle to change

70% of Team Leaders have spent more than two years in their role. 38% have been in the role for two to five years and 32% for longer than five years. This suggests a high degree of comfort and familiarity with the status quo.



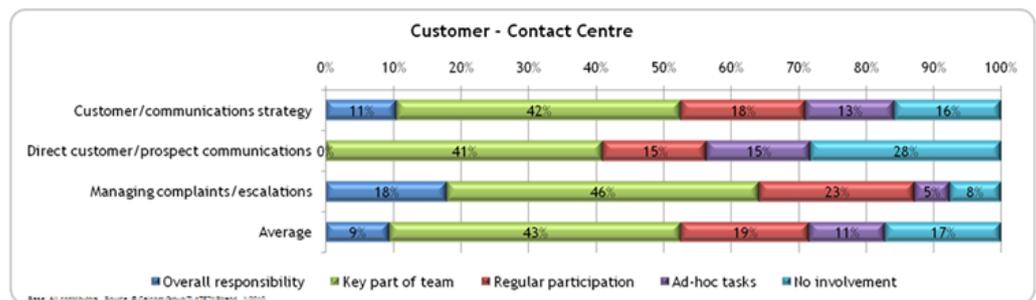
Despite their stated embrace of change, we are uncovering a lack of communication with Team Leaders and of investment in their development. Together these findings suggest that the very people who should manage change at the front line may in fact become obstacles to change, lacking appropriate skills and regular practice.

## Performance in a vacuum

Related to the findings already given about communication, Team Leaders often feel “siloeed”. They manage their teams and produce MI and reports, but they have no sense of how this all relates to the rest of the organisation or what use is made of their reports. This reduces the amount to which they feel involved, and their engagement with the organisation is inevitably undermined. They also feel that they are a dumping ground for ad hoc requests and requirements that they are not in a position to challenge because they don’t have the bigger picture, and their ability to contribute creatively is limited.

## Influence on customer focus

Customer focus for Team Leaders is primarily about direct communication – either handling escalations or simply taking or making calls as part of their day-to-day function.



Over 70% feel that they are involved in developing strategy for customer communication. This is encouraging, but it seems at odds with previous findings about poor communication and involvement. Other parts of the research have shown that Team Leaders often believe they are operating at a strategic level, and this may simply be a problem of definition. The research shows that most Team Leaders spend a large proportion of their time directly communicating with customers, rather than managing their teams to do so.

## Staff as commodities

Almost half the Team Leaders in the survey manage a mix of permanent and contract staff. The use of contract staff, part timers and outsourcing has reinforced a perception that front line workers are viewed as commodities, and this is strengthened by the performance management and measurement practices that are followed.

## Factory mentality

From their beginnings in the 1980s, the key drivers for the development of contact centres were gaining economies of scale and leveraging the developments in information and communication technology. From the outset the main motivation for the growth of contact centres has been cost rationalisation. The outcome has been the adoption of mass production techniques borrowed from the manufacturing world, but applied in a sector that is primarily focused on service provision. The Team Leader role is at the pinch-point between the demands of both.

But although contact centres have adopted approaches from the manufacturing sector, they have not moved with the times to take full advantage of the learning that manufacturing organisations can provide. The most recent management developments in manufacturing may hold the key to resolving the disconnection between personalised service and mass production, and point to how the leadership of teams will change.

### Comparison of Contact Centres and manufacturing development

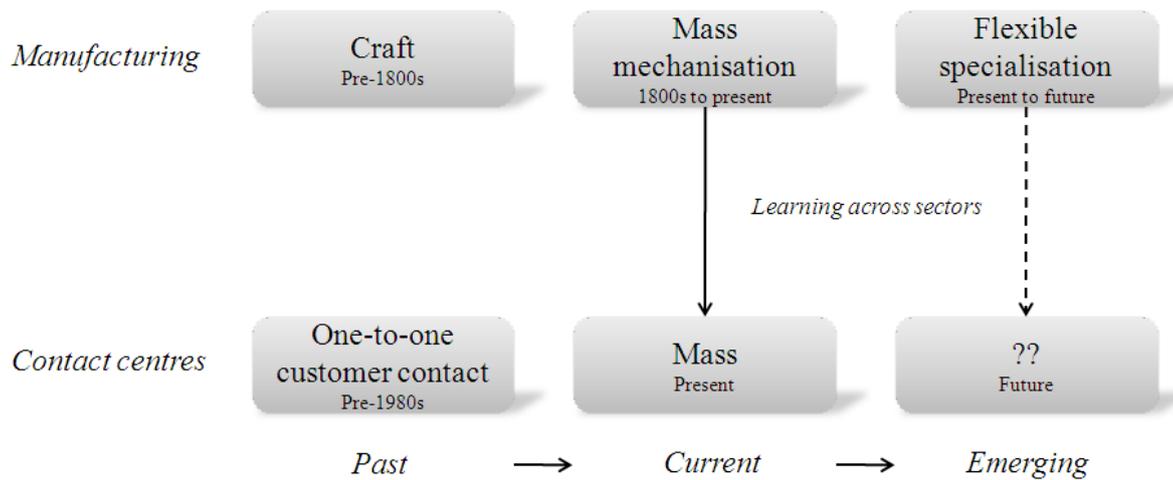


Figure 1: Conceptual framework (Smith et al., 2010)

Manufacturing development can be seen as happening in three phases.

1. The craft phase. Skilled craftsmen, bespoke goods, low production volumes. Direct one-to-one relationship with customers.
2. The mass mechanisation phase. Standardised processes, products and work tasks, high volumes. Management by “scientific principles” - an over-riding focus on productivity and cost reduction. Minimal relationship with customers.
3. The modern era. Sophisticated and empowered consumers. Manufacturers can again customise and personalise products, but now on the mass scale. Organised around concepts such as flexible specialisation and Lean production - rapid adjustment to fast changing marketplace and business environment. Creation of value for the end customer, continuous business process improvement, access to knowledge and insight about the individual customer, and rapid speed of response.

This relates well to the development of contact centres. The one-to-one nature of customer contact before the 1980s has shifted to a commoditised, assembly-line approach that is still predominant. There are signs that a third phase will open, as contact centres begin to investigate disciplines such as Lean, Six Sigma etc.

## The next phase?

This puts Team Leaders in a difficult place. Contact centres are in transition. They must respond to a rapidly-changing business environment and to savvy, well-informed customers. They must embrace new channels integrating them into their ways of communicating. They must reduce cost. Yet they are using industrial techniques, structures and management practices from an era of inflexible processes and adversarial relationships. The research shows contact centres to have one foot, if not both, firmly planted in the past.

<i>Area</i>	<i>Past</i>	<i>Present</i>	<i>Present</i>	<i>Future</i>
	<b>Traditional manufacturing</b>	<b>Uncoordinated incremental improvements</b>	<b>Focused and coordinated product and process improvements</b>	<b>Contemporary manufacturing</b>
<b>Management &amp; organisation</b>	<ul style="list-style-type: none"> <li>• Hierarchical</li> <li>• Impersonal management</li> <li>• Functional focus</li> </ul>	<ul style="list-style-type: none"> <li>• Participative management</li> <li>• Fewer management layers</li> <li>• More open communication</li> </ul>	<ul style="list-style-type: none"> <li>• Minimum management layers</li> <li>• Focused layouts</li> <li>• Employee involvement teams</li> <li>• Work cells</li> </ul>	<ul style="list-style-type: none"> <li>• Self-managed teams</li> <li>• Paperless business</li> </ul>
<b>People development</b>	<ul style="list-style-type: none"> <li>• Minimum training</li> </ul>	<ul style="list-style-type: none"> <li>• Extensive education and training begins</li> </ul>	<ul style="list-style-type: none"> <li>• Cross-trained workforce with job rotation</li> </ul>	
<b>Operations capability &amp; automation</b>	<ul style="list-style-type: none"> <li>• Mass production, inflexible processes</li> <li>• Long production runs</li> <li>• Long lead times</li> </ul>		<ul style="list-style-type: none"> <li>• Flexible automation</li> <li>• Smaller lots</li> </ul>	<ul style="list-style-type: none"> <li>• Low inventories, small lots</li> <li>• Error-free work</li> </ul>
<b>Operations focus</b>	<ul style="list-style-type: none"> <li>• Focus on full capital and labour utilisation</li> </ul>		<ul style="list-style-type: none"> <li>• Quicker response to customer</li> </ul>	<ul style="list-style-type: none"> <li>• Short lead times, quick response</li> <li>• 100% on time delivery</li> <li>• Produce to customer needs</li> <li>• Customer service excellence</li> </ul>
<b>Improvement approaches</b>		<ul style="list-style-type: none"> <li>• 'Waste elimination' focus</li> </ul>	<ul style="list-style-type: none"> <li>• Detailed process studies</li> </ul>	<ul style="list-style-type: none"> <li>• Constant innovation</li> </ul>

		<ul style="list-style-type: none"> <li>• Awareness of total cost of quality</li> <li>• Management committed to the quality improvement process</li> </ul>	<ul style="list-style-type: none"> <li>• Statistical control</li> <li>• Preventative maintenance</li> </ul>	
<b>External relationships &amp; interaction</b>	<ul style="list-style-type: none"> <li>• Adversarial relationships with suppliers, customers and employees</li> </ul>	<ul style="list-style-type: none"> <li>• Developing supplier relationships</li> </ul>	<ul style="list-style-type: none"> <li>• Just-in-time purchasing &amp; operations</li> </ul>	<ul style="list-style-type: none"> <li>• Customer/supplier partnerships</li> </ul>

**Table 1: Stages of progression from traditional to contemporary manufacturing (Tompkins et al., 1996)**

The development of the manufacturing sector points to a way forward. Modern manufacturers increasingly organise around self-managed teams, abandoning the hierarchical, command-and-control model. This is an effective approach to working in the era of mass customisation, a term that could have been coined to describe what we aim to deliver in the modern contact centre.

This would have radical consequences for the Team Leader role as well as for the management culture more generally. Self-managed team leadership involves setting aside authority that derives purely from the leader’s position or job title (Armstrong, 2005). The Team Leader’s role focuses on providing overall direction, communication, facilitation of group processes, coordination and support. The team as a whole has the responsibility and authority for reaching consensus decisions that everyone can support and for which they are held responsible. The range of areas that have this collective responsibility increases as success is experienced, and the Team Leader role becomes similar to that of a captain in a team sport.

The approach requires a more subtle sense of leadership. The Team Leader’s authority comes from:

- Their ability to communicate and represent the team’s interests
- A desire to help all team members to develop and use their skills
- A demonstration of concern for each member of the team
- The ability to facilitate group processes such as discussions, brainstorming, workshops and to negotiate and resolve disagreements
- Awareness of the group’s work processes
- The ability to help the team to maintain its focus, and
- Setting an example through personal behaviour, values, energy and action

For most Team Leaders this would be a very different way of managing. Yet Calcom's research shows that this is the way that Team Leaders generally feel they *should* be working. The issues we are uncovering reflects a deeper set of issues around organisational design and the structure of management. But projecting forward into future models based around self-managed teams we will need skilled, responsive, creative Team Leaders – no longer “cogs in a machine” but active drivers of change. Developing and empowering Team Leaders is therefore not just a fix for today, but a long term investment in the future.

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