

CALL CENTER EMPOWERMENT

2005 COMPUTERWORLD HONORS CASE STUDY

EDUCATION & ACADEMIA

USING AN ADVANCED SUITE OF CONTACT-CENTER APPLICATIONS, THE TEXAS ASSOCIATION OF SCHOOL BOARDS SIGNIFICANTLY IMPROVED SERVICE TO ITS 1,042 MEMBER SCHOOL DISTRICTS, INCLUDING COST-EFFECTIVE RISK MANAGEMENT AND INSURANCE PROGRAMS, PROCUREMENT SERVICES, LEGISLATIVE ADVOCACY, LEGAL AND GOVERNANCE SERVICES, PARENT AND TEACHER OUTREACH, AND MORE. [20055206]

SUMMARY

The Texas Association of School Boards (TASB) serves 1,042 member school districts, with cost-effective risk management and insurance programs, procurement services, legislative advocacy, legal and governance services, parent and teacher outreach, and much more. To improve responsiveness and productivity, it implemented an advanced suite of contact center applications.

APPLICATION

The nonprofit Texas Association of School Boards (TASB) must stay responsive to the wide-ranging needs and expectations of its 1,042 member school boards. At the same time, it faces the perennial pinch of nonprofits everywhere: Keep costs down yet service levels up.

That's no easy task, given that TASB is one of the largest school board associations in the country. In addition to representing every school district in the Lone Star state, it also counts as members 146 educational cooperatives, 46 junior colleges, 38 tax appraisal districts and 19 regional education service centers. The school boards alone preside over combined annual expenditures of \$28 billion, employ more than 560,000 people and serve four million Texas students.

With the help of some 400 employees, this 55-year-old organization fulfills a mission as enormous as the state is big. It provides members with state and federal government advocacy; legal and governance services; legislative information and training; parent and community outreach; and assistance with school operations, especially purchasing, financial and human resource services, benefits and risk management.

Among scores of activities across this wide-ranging service portfolio, TASB manages a sizeable investment pool, runs an online purchasing cooperative that sells everything from pencils to school buses (even dump trucks), and publishes an online policy manual for its member districts that compiles and updates a comprehensive collection of all relevant federal and state laws and regulations. And it's all done within the strictest cost controls, because its bedrock mission is to save TASB members' money so they can focus more resources on their students.

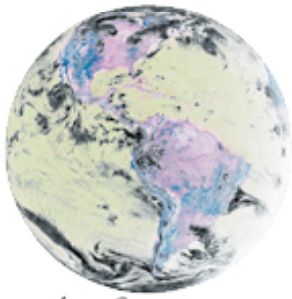
To help deliver on that, just over 100 of TASB's 400 employees are in member-facing roles as front-line contact agents, support associates, and their supervisors who answer more than a dozen toll-free service numbers. They operate out of six relatively small contact centers, all located at TASB's Austin headquarters except for one, with 10 agents located in Houston who are part of the risk management side of its operations.

The risk management part of TASB's operations started in response to school boards' needs when insurance companies pulled up stakes in Texas 30 years ago and left school districts with neither indemnity against health care costs nor protection from hazards and liability. Today TASB's buying power sets pricing benchmarks in offering members health, property-casualty, unemployment and workers' compensation insurance policies, all at the lowest-possible cost.

Because risk management is TASB's biggest undertaking, its function has the largest contact center that fields the most calls at TASB – some 165,000 of the 190,000 calls that come into its contact centers each year.

As the call volumes were growing, and it was becoming clear that to better serve TASB's members, the organization needed a way to streamline its call handling, increase first-contact resolution of issues, and leverage the expertise of its entire organization. Productivity gains were important, too. TASB's contact center agents were frustrated because they lacked the tools they needed to serve their membership at a much higher level.

One example of the problems facing TASB was that its old system would place the caller on hold when its agents were busy – sometimes for several minutes. Caller hang-ups, often from busy teachers on break who had to get back to their classrooms, were rampant. And unless callers used the voicemail



A Search for New Services



Robert Carrigan,
Chairman of the Chairmen's Committee

Ron Milton,
Vice-Chairman of the Chairmen's
Committee

Dan Morrow,
Chief Historian

option, TASB otherwise had no way of knowing who it was that called or a number to call them back. While music and announcements were played while callers were on hold, TASB could give no information about their estimated wait time or alternative means of contacting staff. In addition, agents had no way of knowing whether there were one or 100 calls in queue, nor did it know who in the organization might be available to help in handling the calls.

The problems were made worse in TASB's view because, in general, people's expectations of how they want their calls handled have risen dramatically over the years as they experience the sophisticated contact center capabilities of large commercial enterprises.

As a result the customer experience could be maddening. When a teacher called TASB for an insurance claim, for example, he or she might be left in a "black hole" of a call queue for an indeterminate time without options for leaving a message and without knowing how long the wait for an agent would be. During school hours, teachers have extremely limited break time, so sitting on hold for several minutes just wasn't acceptable.

In addition, when a call center agent needed to transfer a caller to an insurance adjuster or other TASB expert, the agent had to manually track him or her down, not knowing whether they were in a meeting, down the hall, on the phone or out of the office.

Altogether this wasn't exactly the informed, responsive and customer-friendly face TASB wanted to give its association members. The situation was especially ironic because the culture of TASB is so service-oriented.

Although the contact center tools were out there, they were unfortunately out of reach of TASB's budget. TASB's telecommunications manager knew about the Siemens HiPath ProCenter contact center portfolio that targeted large enterprise needs and is used in some of the nation's largest, high-volume contact centers. So, as an active member of JUST-US, the Siemens user group, he contacted Siemens about porting those features that small and medium-sized businesses would find most useful into a more affordable package, which eventually Siemens did in a software application called Siemens HiPath ProCenter Agile. His role in the user group helped to amplify his request and shows the value of user groups to technology vendors.

In fact, despite being designed for TASB-sized contact center needs, the Agile application includes presence-aware and collaboration tools not yet available on other large enterprise contact center suites. Presence-awareness is rooted in the technology behind instant messaging's "buddy lists" that show who's online at any given time.

These kinds of tools allow agents to visually monitor who's available to help with a particular issue and, with one-click, they can opt to transfer the call to that person, park their member call and consult with the expert, or set up a multiparty conference. The latter capability can help front-line agents listen and learn while the expert addresses the issue. And whichever way they choose to direct a call, agents are now able to close more issues on a first-call basis.

By way of a point-to-point T1 line, TASB also extended the contact center capabilities of its contact center application to its Houston risk management group.

Given that Agile's contact center capabilities are so far ahead of what TASB had before, the organization lacked a baseline to fully quantify the gains in member satisfaction and agent productivity, but all indications are that those gains are to the positive.

For example, from July through November, 2004, total abandoned calls were down 61 percent compared to the same period a year before, and abandoned calls as a percentage of total calls were cut in half.

TASB's new technology wish list includes incorporating customer relationship management (CRM) software into its contact center capabilities and eventually replacing TASB's private branch exchange (PBX) with a voice-over-IP (VoIP) platform that will converge its voice and data networks for even more cost-savings.

The latter prospect is especially compelling, TASB's telecom manager says, because it will give TASB more options and flexibility for using agents and experts outside the Austin area. With a VoIP platform and its contact center application, agents and experts working remotely or from home outside Austin will be able to use the organization's IP virtual private network (VPN) to access the call center and log onto the contact center system. This will help broaden the hiring pool as well as allow agents to work from home when they want to do so.

BENEFITS

Member service is the hallmark of associations, yet their nonprofit status demands economical approaches to every venture. Despite this traditional constraint, now TASB callers – many who are teachers on short breaks – can get their issues resolved much more quickly because TASB can manage their calls so much better.

TASB experts – from insurance adjusters to procurement specialists to many others across a variety of

disciplines – can be engaged faster than ever, and if no agents are available, callers are given the estimated wait time for an available agent, along with options for emailing their inquiry or leaving a voicemail message. If they choose to wait on hold, at least they know how long it will be.

TASB's contact center agents, too, enjoy their work more because they now have the call management tools they've needed to serve their membership better.

The internetworking of TASB's voice and data, along with a feature-rich yet economical HiPath Agile contact center application, plus voicemail and auto-attendant support have all combined to raise the level of service to its 190,000 callers a year beyond what many commercial enterprises can achieve – despite TASB having substantially fewer resources.

IMPORTANCE

The TASB project is part of an overarching vision to deploy enabling technology to raise the level of member service while containing or even diminishing costs. In this project, TASB could not achieve the greater member responsiveness it has without the technology represented by the HiPath ProCenter Agile contact center application and its supporting platforms and connectivity.

TASB's Agile system runs on a Windows 2000 server hosted in Austin, internetworked between its data and voice networks and its LDAP directory for point-and-click, speed-dial capabilities.

A point-to-point T1 line extends Agile's contact center capabilities to its Houston risk management group. With TASB's objective of network convergence underway and a single image across all six contact centers, callers never experience the fragmented service they once did. No more dropped calls. No more indefinite hold times. No more transfers to uninformed agents.

Agile's presence-aware and collaboration tools – part of the application's Agent desktop GUI – are context- and role-sensitive to support collaboration on caller issues and facilitate first-call resolutions. Agents can visually monitor who's available to help with an issue and, with one-click, can opt to transfer the call to that person, park their member call and consult with the expert, or set up a multiparty conference. That last feature can help front-line agents listen and learn while the expert addresses the concern.

Siemens HiPath Xpressions unified messaging system provides voicemail caller support. Outbound messages announce wait times and member news and information via the Siemens HiPath Call Director along with an Intermedia XMU+ digital recorder and message playback device.

More than half of TASB's 14-year-old phones were replaced with new Siemens IP-capable optiPoint 500 desksets, with the rest scheduled to receive Siemens optiPoint softclients for full point-and-click telephony capabilities to the agents' Dell OptiPlex desktop PCs.

Siemens worked with TASB's 40-person IT group to install the new system, which offers wizards to simplify installation and a graphical administrative Design Center for building routing and call processing flows. Loading the application onto the server took an afternoon, then a day was needed to build the group profiles and train the supervisors. Given the Agile application's intuitive GUI and ease-of-use, only an hour of agent and associate training was required the next day.

ORIGINALITY

Many nonprofit organizations may not think they have contact center needs, but may in fact operate an informal contact center and not know it, if the nature of the calls and volume of those calls require tracking, followup and frequent call transfers to subject matter experts.

That's why TASB's unique experience in deploying the HiPath ProCenter Agile contact center application, which was designed for small and informal contact centers, can serve as a model to other extended, nonprofit enterprises. They can learn that an economical yet feature-rich contact center application now exists that can dramatically raise their levels of client service and productivity. At the same time, the technology enables their agents to focus more time and energy on serving those clients – the essence of what attracts many to work in nonprofits in the first place.

The organization's overall upgrade to its technology foundation supporting its member services was indeed a first, as TASB's telecommunications manager used his influence as an active member of JUST-US, the Siemens user group, to influence development of the contact center application at the core of the upgrade. He convinced his management that the risk in piloting of the application in TASB's operations was much less than the pain of continuing member services using inadequate tools and technology.

SUCCESS

TASB's vast constituency generates about 190,000 member services calls a year, but its phone technology had fallen behind both callers' volumes and expectations of responsiveness. Long, indefinite hold times, lost transfers, and hang-ups were epidemic. TASB's 100-plus member-services

team – 25% of its staff deployed across six contact centers – were also frustrated, knowing they could do more

The solution was to consolidate 40 toll-free numbers to 17. Then deploy Siemens HiPath Xpressions unified messaging system to enable callers to reach their TASB service person directly or leave a message; and HiPath ProCenter Agile, an economically-priced, server-based contact center application with presence and collaboration tools usually only found in much more expensive packages.

Results: Today the messaging system dispatches about 40% of member calls to TASB staff extensions directly, conservatively saving about \$45,000 a year in overhead otherwise needed for contact center staff – a 14.6-month payback on the system’s \$55,000 investment; the contact center application has increased agent productivity by about \$45,000 as well – a 16-month payback on the \$60,000 investment; and caller hang-ups, once 4.26% of calls, have dropped 61% to 2.13% of calls.

Staff user comments:

? “Although Agile offers many new tools, part of the beauty of the product for TASB was how easy the client/agent screen is fully customizable; each user modifies for how they work including a choice to not use any GUI if they desire.”

? “Highly flexible. Very powerful. Well-designed, easy-to-use user interface; great use of shapes and colors for icons.”

? “Gives us a “taste” of what IP-soft phone features will be like as TASB moves to an IP-enabled enterprise communications platform.”

? “Agile agent screens make each agent more aware of what the rest of the team is doing; agents no longer feel like they are the only person answering the phone! Real time personal stats give agents a sense of their own performance compared to the rest of the team.”

? “Supervisors like the powerful reporting tools and easy to use statistics that are now available to them.”

? “System admin is much easier; we use the powerful tools to quickly analyze trouble reports.... And implement a new solution if needed.”

DIFFICULTY

The greatest obstacle to success was the fear of change by both agents and by management, especially concerning the addition of new technology. The project team had to carefully introduce the new HiPath ProCenter Agile contact center system in a way that would appear to the agents that something was being done for them instead of to them. Management was concerned that the change would be too much for agents who were already stressed by the call volume demands.

All this was overcome by the Agile application being easy to learn and use by the agents. For supervisors, they quickly learned that the application’s reporting functions gave them management tools and real-time data they never had before, so they could develop performance metrics and historical benchmarks for the contact centers as well as the individual agents. These tools also enabled them to staff appropriately at different times.

The most surprising challenge was how quickly agents and supervisors adopted the technology once it was introduced. They picked it up so fast that they outpaced the project team itself, asking for new call routing rules, additional functionality and more reporting capabilities before the project team had learned enough to fulfill their requests.