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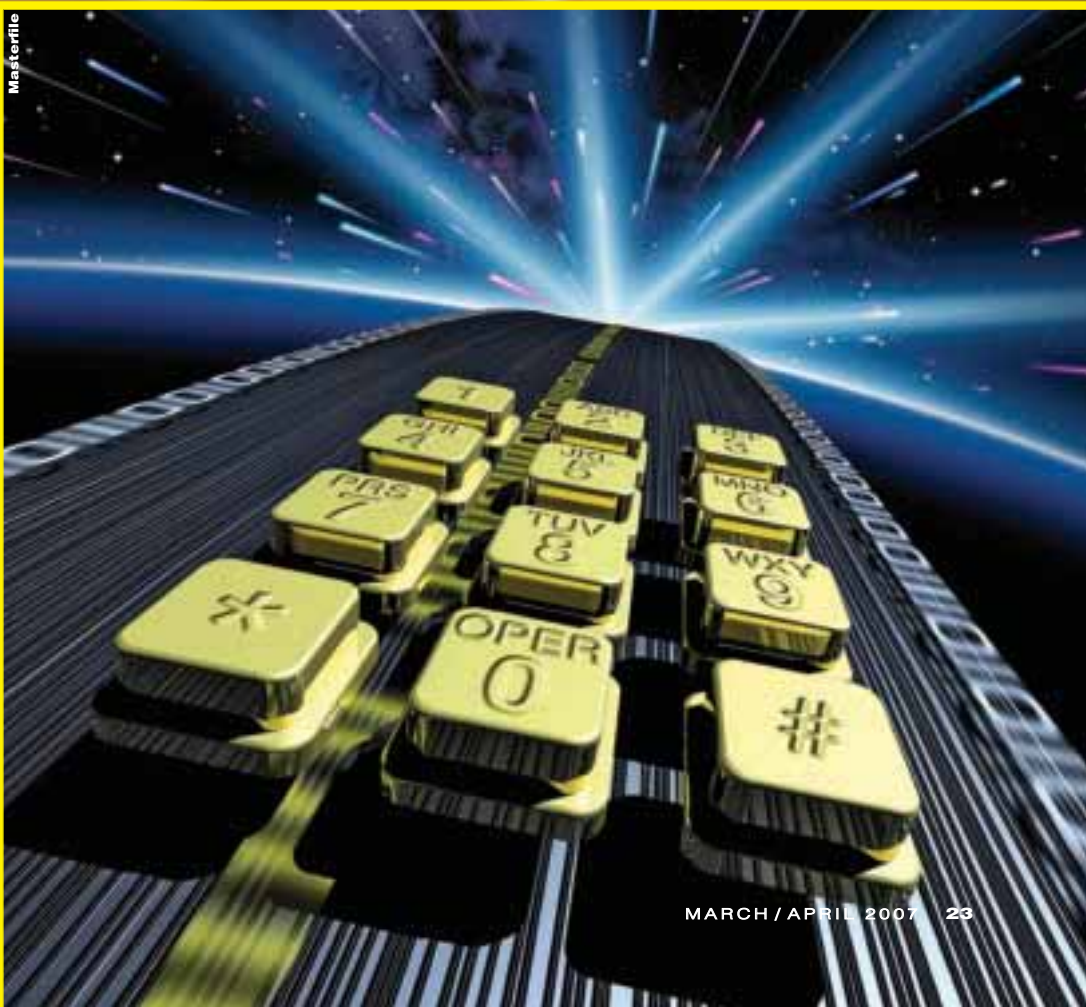
## FOR CUSTOMER SERVICE

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AS THEY INTEGRATE  
NEW TECHNOLOGIES  
AND OVERSEE A  
CHANGING WORK-  
FORCE, CALL CENTER  
MANAGERS STAY  
FOCUSED ON THEIR  
CUSTOMERS.  
BY JOANNE SAMMER

Jon Riley / Folio





Masterfile

**A**ccording to industry estimates, a midsize utility call center potentially handles more than 3.5 million calls a year. If you break it down further, that comes to almost 10,000 calls per day or about 400 calls an hour. That's a lot of phone calls by anyone's measure. And since call centers are staffed 24/7, there is always a way to take that call.

As the unseen face and voice of a utility, customer service representatives (CSRs) answer those calls—whether those customers are panicked, angry, or just seeking an answer to a simple question. Customers may want to know when their power will be restored if there is an outage, why their bill is higher than usual, or how they can avoid a service interruption for an unpaid bill. And for most people, their first instinct is to pick up the phone and call customer service.

With many Baby Boomers readying for retirement and with an increasingly mobile workforce, call center managers face big challenges to keep their phones fully staffed. They have been helped by better and more customer-friendly technologies such as interactive voice response (IVR) systems that allow them to answer the same number of calls with fewer employees. Managers also are training and developing CSRs who are more efficient and knowledgeable, improving the agents' ability to resolve customer problems on the first call, and finding new ways to keep costs in check.

But even as they strive to meet customer needs, call center managers also face internal pressures. "We are focusing on doing more with less," says Alena Holcomb, manager of the customer communications center at WPS Resources. "We need to make sure we are doing everything we can to save money because every call adds to our costs, and we want to be more competitive." For Holcomb, this means making sure the customer self-service options, including IVR systems, web-

*Joanne Sammer is a business writer in Brielle, NJ.*



site, and self-service paying stations are meeting customer expectations. "We have to make sure we are providing the services that [customers] want through those channels," she says. And as rates increase, customers expect more detailed account information and easier account management from their electric company.

### **Interactive Voice Response**

Call centers leverage technology for two reasons: to manage customer requirements and to keep costs low. "We either have to manage the calls ourselves or use technology to reduce the number of calls that come in to the call center," says Dale Bielefeld, manager of residential services for E.ON US. As in many companies, the utility's IVR system takes on the easily answerable questions. Customers have the op-

tion to use the IVR's self-help functions early in the call, and the company has enhanced its IVR system by putting in various exit points where customers can choose to end their call or speak to a CSR. (See the sidebar, "What's an IVR System?") In addition, the company has automated pay stations where customers can go to pay their bills. If a customer is in danger of having his service disconnected, he can obtain a receipt number and enter that information through the IVR to make sure his service is not interrupted.

But how much self help is too much? "Companies could find that having too much technology gets in the way of customer service rather than facilitating it," says Jeff Elliott, a director with Mercer Management Consulting. Simply offering self-service options may not be enough. By evaluating the



**By enhancing customer service options, including IVR systems, website, and self-service paying stations, utilities allow for easier account management.**

friendliness and operational efficiency, Camack suggests that companies bring customers into the design loop to ensure that all technology meets the needs of all customer groups, technophiles and nontechnophiles alike. Since this is

crucial in an industry with such an important role in public safety and service, it is also a good idea to conduct regular benchmarking to see where the

company stands compared with others in the utility industry, as well as companies in other industries, such as telecommunications, cable television, and financial services. "Customers will make the decision about whether to use technology based on whether doing so is to their advantage," says Camack. For example, customers may balk at using an IVR that asks for an account number when the system leads them to a CSR who asks for the same information. "It must seem logical to the caller," he says.

Tools like customer interviews and focus groups, as well as market research, can also help utilities to understand what customers expect and what they can handle from a technology and self-service standpoint. After Portland General Electric (PGE) polled its residential and small business customers about how they wanted to do business with the company, PGE decided to make some extensive changes. For example, the company has maintained separate web sites for the two customer groups,

technology and the way it is used by customers, utilities may find that customers are more advanced than previously assumed.

The utility can have technology play an important part in call center operations, but ultimately customer needs are what drive the use of technology and not the other way around. "The ever-present issue for call centers, particularly for utilities, is operational efficiency and cost management," says Mark Camack, vice president of consulting firm Market Strategies and author of its 2006 Energy Utilities Interactive Voice Response Benchmarking Study. Although technology can help achieve both goals in the call center environment, it will only do so if customers are willing to use the technology.

To create this balance between user

## What's an IVR System?

An interactive voice response unit, according to *PC Magazine*, is an automated telephone information system that speaks to callers with a combination of fixed voice menus and data extracted from databases in real-time. The caller responds by pressing digits on the telephone or speaking words or short phrases.

In many cases, "interactive voice response" is somewhat misleading. IVR is a generic category that also encompasses systems with touch-tone-only responses (and hence without actual voice interaction). Most companies (and most utilities) have yet to add automated speech recognition, which most people deal with when they call their credit card company or national insurance carrier, for example.

IVR systems allow callers to get information 24 hours a day. They are also used as a front end to call centers in order to route as many calls as possible away from costly human agents. In such cases, IVR does not replace the agent, but keeps him from constantly having to answer the same simple questions.

Most IVR systems reside in computers connected to the telephone system to switch the calls and can be connected to local area networks. They also come with software that lets the developer create applications quickly.



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Courtesy: Jackie McDonald / Duquesne Light

**In some cases, IVR has actually increased call center volume since customers tend to call more frequently to do routine tasks.**

but based on customer feedback it will be merging the two sites into one, a change that will be especially important as customers conduct more transactions online.

Camack suggests that utilities work hard to avoid introducing unnecessary technological complexity in a customer service environment. For example, the IVR system should include words and phrases that are readily understandable to the average customer rather than using industry or internal jargon. (See the sidebar, "Avoiding IVR

Mistakes.") "Technology needs to be less internally focused," he says. "You have to respect the customer by taking a complex business and reducing it to simple terms for customers."

Simplicity is important for most utility IVR systems, which are touch-tone only. This thinking applies to the emerging utility use of speech recognition, as well. Even though the technology is not new, it is still in its infancy due to the human factors involved and customers' willingness to use it. "You have to balance the financial promise of this technology with the user experience," says Camack.

But if utilities can migrate customers to speech recognition, the benefits



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will be significant. The primary benefit would be call compression, since rather than going through several levels of IVR, a customer who wants to sign up for budget billing, for example, would be able to say “budget billing” to reach the proper application. The result would be shorter and more efficient calls and, presumably, more satisfied customers. But even with these innovations, technology does have its limits when it comes to reducing call center volume. Duquesne Light, for example, has seen the percentage of calls handled by its IVR system grow from about 2 percent to 30 percent over the past five or six years. Surprisingly, call center volume has actually increased slightly during that same period. Barbara Friend, the company’s director of customer service, attributes the overall increase in calls, in part, to the ease of using IVR. “We’ve made it so easy for customers to do routine tasks, such as checking account balances by using the IVR, that they tend to do so more frequently,” says Friend.

Working with a utility’s multiple lines of business is an increasingly important part of this technology-planning process. “We need to make sure our long-term plan for the customer service infrastructure is meeting business needs and flexible enough to accommodate future trends,” says Cody Fadness, supervisor for contact center technology with PGE. “We don’t want to use bells and whistles unless they provide a clear benefit to our customers.”

### Greater Efficiency

Technology is a powerful tool but not a cure-all; call centers also need to improve their own efficiency. To help off-load call volume, E.ON has equipped its 26 business offices with voice over internet protocol (VOIP) telephones so that employees in those offices can handle a certain number of customer service calls during downtime. VOIP is a category of hardware and software that enables people to use the internet as the transmission medium for telephone calls. “That has drastically reduced queuing time during peak periods,” says Bielefeld. Moreover, the

## Avoiding IVR Mistakes

Electric companies are making strides when it comes to moving customers toward self-service options like interactive voice response (IVR) systems. However, some companies can do a better job of making IVR systems more helpful and user friendly, according to the “2006 Energy Utility Interactive Voice Response/Automated Speech Recognition Benchmarking Report,” conducted by Market Strategies ([www.marketstrategies.com](http://www.marketstrategies.com)). Following are some of the benchmarking report’s most common problems with IVR.

- 1 Menu options are either too short or too long.
- 2 There is an imbalance between functionality and usability.
- 3 Customers can’t find a menu option that meets their needs.
- 4 Menu options are focused on company needs rather than customer needs.
- 5 The IVR menu options use jargon that is not readily understood by customers.
- 6 There is no way for customers to start over if they make a mistake.
- 7 Error messages blame the caller.
- 8 Multiple language options may not be justified by the customer demographic profile.
- 9 More than five seconds of dead

air can cause users to hang up and call back.

- 10 Inconsistent quality in the IVR’s sound and efficiency reflect badly on the company.



**Some utilities improve efficiencies by equipping multiple business offices with VOIP telephones.**

employees in the business offices tend to be long-term employees with an average of 19 years experience. "Those employees tend to have a good grasp of the bigger picture and have become more connected to the customer base," he says. "It's a cost-effective solution that helps us to better use internal resources."

In some cases, utilities may find that internal operational issues, such as problems with the billing system, are driving call volume. In these cases, it is a good idea for call center managers to discuss those issues with the appropriate operating managers and work to resolve them. These situations may



Courtesy: Genesys Telecom Labs

occur because of problems with billing complexity or errors, lack of communication with field technicians, or any other type of problem that affects customers. Even things that frustrate call center agents can become ideas for process improvement. "If something doesn't make sense, we want to know about it," says Robin Souder, director of the customer service center for Aquila. "We encourage people to come forward with their ideas and we are open to listening to them."

As new communication channels appear, PGE found that the skill-sets for handling email contacts with customers are slightly different than those for telephone contacts, and a CSR who excels at telephone contact may not have the written communication skills necessary to handle email contact. "We need to better manage these different contacts," says Fadness. To that end, the call center has developed a resource pool identifying the skills of each CSR and the tasks each can perform. This allows call center management to queue all customer contacts, in addition to telephone calls, and funnel them to specific CSRs for proper handling. "We are working on quantifying the time spent on various processes because one of the keys to our success is finding bet-



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ter ways to manage the different types of contacts,” says Fadness. “Our goal is to meet customer expectations better and faster.”

Other utilities are attempting to increase efficiency by capturing the institutional knowledge within their call centers for future workers. Facing a wave of retirements among call center employees, Duquesne Light is focusing on transferring the knowledge of those Baby-Boomer employees before they leave the company. This is particularly important for Duquesne Light because the company has traditionally staffed its call center with older employees with decades of experience working

for the company. “These employees have 25 years or more experience and understand both our customers and our business,” explains Friend.

The call center has developed an internal customer service website that will be enhanced with information on policies and procedures vital to call center operations that can be accessed using a keyword search. The call center also has a “consistency team” designed to help call center agents to understand the business and deal with customers

**Utilities are developing new methods for capturing institutional knowledge and ensuring the consistency of responses.**



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### The IVR effect. Calls that reach call centers now tend to be more complex and require more time and skills to resolve.

in a consistent way. This consistency discourages customers from contacting the call center multiple times hoping to get a more favorable resolution to their problem. At the same time, CSRs must understand that not all customers are the same and some may require different solutions due to extenuating circumstances. For example, a customer with a disabled family member at home might require faster service hook-ups than the company would normally provide. The key is to help CSRs recognize and evaluate valid requests for special treatment and to know how to deal with them.

### First-Call Resolution

The main goal of call center efficiency is improving first-call resolution. With more customers using self-service channels, many customers only contact the call center when they have a complex problem that cannot be solved using IVR or another self-service channel. Therefore, the calls that end up in

the call center tend to be more complex and require more time and skills to resolve, making first-call resolution that much harder to achieve. For example, if a customer calls after receiving a bill that is more costly than usual, the CSR must explain that rates have changed or walk the customer through other reasons why the bill might be higher while also being alert for signs that there could be errors in the bill.

Indeed, this focus on first-call resolution has changed the way call centers handle calls. In the past, the goal was to get customers on and off the phone quickly. "When customers have a detailed problem, they want to talk about it," says Joe Van den Berg, a partner with Booz Allen Hamilton. This makes the role of the call center agent more complex. "In some cases, call center agents have to deal with seven different screens to get an answer to the customer," says Van den Berg. "And customers expect the same level of service from a customer service center in any other industry." In this environment, time-based benchmarks of CSR performance may no longer be relevant.



Novastock / Folio

Although it is difficult to create a correlation between call complexity and agent turnover, call center managers understand that more complex calls can take a toll on CSRs. To help prevent burnout, more call centers emphasize task rotation, such as working on training aids or handling written customer communications, to give agents periodic breaks from taking calls.

One way to improve performance and reduce agent stress is to identify good problem-resolution strategies and use them to create a script for handling certain types of calls. "The focus of this type of script is to help the agent better understand and isolate the cause of the problem," says Mercer's Elliott. "This, in turn, leads to improved relationships with customers and less stress for the agent."

When it comes to increasing first-call resolution, Don Conoly, director of the customer care center for Georgia Power Company, considers whether it is training or operational issues that are preventing customers from completing their transactions on the first try. "Our focus this year is to analyze information down to the individu-

al level and look for ways to change in order to ensure that those transactions are completed on the first call," he says. For example, if an agent fails to tell a customer about a new billing or payment program, the customer is likely to call back with more questions once he receives his bill. "When we identify situations like this, we can

coach the agent on how to handle it in the future," he says.

#### **Staffing Conundrum**

Although greater efficiency and better first-call resolution are worthy goals, call center managers continue to wrestle with the problem of finding, training, and retaining the right people for

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the call center. Souder has been benchmarking turnover in the utility industry to see how Aquila compares to its industry peers. Also, the company has begun redesigning call center jobs to introduce more variety and challenge into the tasks involved. "We want to make sure job responsibilities are not solely focused on taking phone calls," says Souder. "We're looking for ways to introduce other productive work."

Souder plans to begin assigning CSRs to jobs and tasks based on the employee's areas of interest, even if the work is not call-center related. The challenge, of course, is to do so without sacrificing necessary staffing and service levels in the call center. For example, the call center has developed an automated online reference tool that CSRs can use if they have questions or need more information about specific processes.

The responsibility for updating the tool will be shared among a few call center agents with the necessary technical skills to contribute additional content and complete that work. The company also is considering moving CSRs out into the field with service technicians

**To combat burnout, call centers use task rotation, such as working on training aids or writing emails and letters.**

Courtesy: Georgia Power



so they can see people doing the work and understand how customer situations are resolved. This should help agents to ask the right questions of customers in order to provide enough

information so that service technicians can deal with the problem quickly.

Souder also is creating development plans for each CSR that focus on what that agent wants to do career-wise and how he can achieve those goals. Supervisors encourage employees to take on different tasks and responsibilities based on their interests and skill-sets.

To reduce its call center turnover, WPS Resources has developed a lengthy selection process, increased its ongoing training, and developed a coaching and mentoring program for individual agents. The selection process includes behavioral-based interviewing designed to highlight how candidates dealt with specific situations in other jobs in order to see how they might handle specific call scenarios and perform in a call center environment.

**To reduce turnover and enhance the skill-sets of CSRs, many utilities offer significant cross-training opportunities in other departments. Conversely, people from other parts of the company may move to the call center for similar training.**

To enhance the skills and opportunities available to CSRs, PGE offers significant cross-training opportunities. “We allow seasoned reps to do cross training lasting from 6 to 12 months—they essentially do someone else’s job for that period of time,” says Fadness. He estimates that the company has 20 to 40 call center employees (or approximately 15 to 30 percent of available agents) cross training at any given time.

Of course, if CSRs are cross training, they are unavailable to work in the call center. And that is a major issue that the company has to balance against the enhanced retention and skill building it gets from the cross-training program. “There is a definite quantifiable cost to the call center,” says Fadness. “The big challenge is finding the balance between our desire to promote employees and help them develop their skills, and meeting the needs of the call center.”

So far, the balance is clearly in favor of continued cross training since a high percentage of former call center



Courtesy: Jackie McDonald / Duquesne Light



Courtesy: WPS Resources

employees succeed in their new positions and remain with the company. Moreover, cross training also works the other way, with individuals from other parts of the company, such as meter readers, moving into the call center for cross-training purposes. In fact, the program is so successful that the call center has a greater problem with internal turnover (people leaving the call center to work in another part of the company) than external turnover, where people leave the company completely.

An aging workforce also can have major implications for call center oper-

ations and turnover. "Things are going to change significantly in the coming years, so we are working on a five-year plan to develop an optimal organizational structure and knowledge-transfer effort to reshape our workforce with minimal impact to the company, other call center employees, or our customers," says Duquesne Light's Friend.

### Outsourcing

Many companies, particularly those in financial services, have made the decision to outsource their call centers to a third party. While utilities have not been immune to this trend, many elec-

tric companies are saying no. They consider customer service to be a core part of the business that should remain in-house, particularly if outsourcing vendors are not located in the same geographic area. "Companies see this as a dramatic step because they are taking away their personal interface with the customer and giving it to someone else. And utilities tend to be risk averse," says Mercer's Elliott.

Instead, Elliott sees more selective outsourcing taking hold in which utilities contract noncore functions. For example, some utilities rely on vendors to provide back-up IVR and other technology during periods of unusual call volume, such as following a power outage.

The one exception to the outsourcing rule occurs in the wake of an acquisition. In those situations, it may make more sense to outsource as much of the newly ac-

quired company as possible rather than try to integrate it into the parent company's operations, particularly when doing so involves merging two different technology platforms. "The outsourcing approach can allow companies to ramp up their newly acquired resources quickly," says Booz Allen's Van den Berg. "If companies are planning on several acquisitions, having an existing relationship with an outsourcing provider makes it easier to move acquired companies straight to the outsourcing platform."

WPS Resources saw outsourcing as the easiest solution after acquiring two companies in recent years. The outsourcing agreement covers all meter reading, billing, remittance, processing, IVR, and customer calls about bills. "We looked for a vendor that was experienced in and had knowledge of the utilities industry because the industry is unique in many ways," says Holcomb. "We found a company that could do the whole thing better, cheaper, and faster than we could in-house following the acquisitions."

Although Holcomb is noncommittal when asked whether outsourcing is the wave of the future, she does note that the existence of successful outsourcing arrangements challenges call centers to improve, especially as industry consolidation continues.

Indeed, Georgia Power's Conoly has turned the outsourcing question to his advantage. Although the company is adamantly opposed to outsourcing its customer service function, Conoly benchmarks the call center's costs against what the expense would be to outsource the function. "This way, we know what is available, and we can make sure the call center's cost structure remains competitive," he says.

Most call center managers are under similar pressures to keep costs down. By using critical tools such as IVR systems, they are able to reduce the overall cost per call by a significant amount and invest those savings in better training and retention programs for their CSRs. Only time will tell, but their dedicated efforts seem to be paying off. ♦

**Outsourcing agreements cover a variety of different tasks, including billing and processing payments.**

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