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The Global Learning for the Contact Center Community

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Session #: 503
Managing Seasonal Peaks Through Effective Strategic Planning

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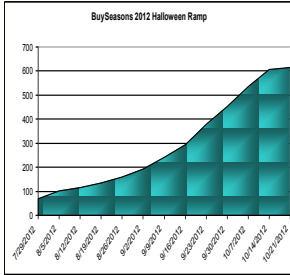
Servantage Dixie Sales



creating seamless brand experiences

- Independent, full service, value-added distributor who enhances end user experiences
- We provide solutions that enhance the needs of our key customers (OEMs and National Retailers)
- Entrusted to serve the customer base of some of the largest retailers in the US and Canada and the leading OPE manufacturers in the world
- 5X Seasonal Ramp Annually from 35 to 150+ CSRs handling inbound calls, emails, faxes and back office

BuySeasons



- The largest online only retailer of costumes and party supplies
- 2011 BizRate Circle of Excellence Award winner
- StellaService rated our sites as 1 and 2 for the best service by internet costume retailers last Halloween
- Halloween Peak with 10X Ramp

Session Description/Agenda/Objectives



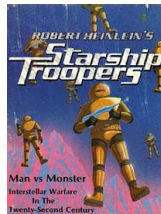
- Advance Planning
- Recruiting, Hiring, Selection
- Training
- Seasonal Leadership
- Voice of the Customer
- BPO Management
- Ramp Down



Advance Planning

"There is no such thing as luck. There is only adequate or inadequate preparation to cope with a statistical universe."

- Robert Heinlein



Advance Planning

Strategic Planning: **Systematic process** of envisioning a desired future, and translating this vision into broadly defined goals or objectives and a **sequence of steps** to achieve them....At every stage of strategic-planning the planner asks, "What must be done at the previous (lower) stage to reach here?" Also, in contrast to tactical planning, strategic planning looks at the wider picture and is **flexible in choice of its means**.

-The Business Dictionary

Win October in February

-What my team gets tired of hearing

Advance Planning

Technology

- Workforce management that seamlessly handles seasonality
- ACD system that allows us to integrate CSRs from our call center, working from home, and offshore
- Seat Planning Software that allows us to maximize utilization of space
- Chat software that drives productivity while reducing call/email volume
- Training tools that allow us to train anyone anywhere at the right time
- Knowledge management tools that make it easy to find the answers
- IM and whiteboard tools that allow easy communication to leverage limited SMEs
- SaaS models allow us to "right price" for our seasonality – refuse to do business with vendors unable/unwilling to adjust for seasonality

Advance Planning

Staffing


- Model the season day by day for all work types (19), including leadership roles
- Estimate part time staff hours per week
- Space planning is critical

New Berlin CS Seasonal Training Plan											
	Training Class 1	Training Class 2	Training Class 3	Training Class 4	Training Class 5	Seasonals Hitting Floor	Seasonals Trained to Date	Anticipated Turnover	Seasonals Remaining after Turnover	Seasonals Required On Floor	Staffing as % of Goal
2-Sep	14	12	0	0	0	22	83	4	72	72	100.2%
9-Sep	14	14	0	0	0	26	109	5	93	87	106.7%
16-Sep	16	14	16	14	14	28	137	6	115	98	116.9%
23-Sep	18	14	18	14	18	74	211	10	179	155	115.8%
30-Sep	18	14	18	14	18	82	293	13	248	218	113.4%



Advance Planning

- Flexibility and Realism
- Marketing will shoot for record sales and HR for record low attrition
- Plan absenteeism and turnover for the real world
- Recruit a highly flexible part time workforce (80%)
- Tropical storms DO hit the Philippines in October
- Daily analysis of sales/contact trends
- Well rehearsed Outage Procedures



"People don't think it be like it is, but it do."
- Oscar Gamble

Recruiting, Hiring & Selection

- Minimal recruitment and advertising costs
 - Social Media, colleges/high schools, local TV, Radio, News & Word of Mouth
- Partner with Human Resources
 - Agree on a turnover rate
 - Layout expectations months in advance
 - Offer resources to ensure success
- Utilize free resources and form relationships
 - Maximus
 - UMOS
 - Local employers with complimentary peaks
 - Workforce Coalition

Recruiting, Hiring & Selection

Job Fair

- Months of planning with HR and contact center.
- The goal is to screen out applicants and select potential candidates to be interviewed onsite.
- 50 to 60 employees required to make it successful. Focus on everything from parking to weather.
- Advance interview training and detailed screener.
- Workstations dedicated to assessments.
 - Data entry, learning potential, emotional intelligence, etc.
- Opportunity to shadow current CSR.

Recruiting, Hiring & Selection

- Need for a flexible workforce
- Remote workforce
- Full-time and Part-time Schedules
 - Importance of providing training options for part-time
- “Virtual Queue”
- Understanding there is life outside of season



Training

- Year round identification and development of trainers
- Comprehensive Train the Trainer Sessions
- Multi-media training and stories to increase retention
- Frequent assessments to measure progress and assess the need for alternative strategies
- Final comprehensive assessment
- Daily detailed updates from trainers



Training

- Training does not end in the classroom
 - Incubation day
 - Self paced tutorials provide in depth detail
 - Follow up sales training
 - Detailed hand off from trainer to supervisor
 - Regular evaluation of trainers
- Regular QA and feedback on decision making
- Targeted visits by Subject Matter Experts
- Communication between Training, Help Line, Floor Supervision, Quality Assurance and Support

Seasonal Leadership

- Develop the core staff year round
 - Leadership training
 - Projects that challenge them to move beyond comfort zone
 - Create IDPs to provide core team members with a path to their seasonal leadership goal
- Clearly define each Seasonal Leadership Role
- Develop a well defined selection process
- Provide premium pay during season
- Incorporate Paid College Interns in Supervisor/Trainer roles

Seasonal Leadership

- Home Based Agents return to the Call Center for Peak
- Provide specific training for each role
- Specialization is critical during season
 - QA, Trainers, Floorwalkers, Helpline, Supervisors, Operations
 - Build in breaks from the toughest tasks
- Have management mentors to work closely with Seasonal Leaders
- Clearly define tasks and timelines; measure success – required post training evaluations, bi-weekly reviews, etc.

Seasonal Leadership

- Clearly defined plan to ramp down seasonal leaders
- Provide end of season evaluations
- Be clear on the time frame for premium pay to end
- Hold discussions on the importance of returning to primary roles
- Provide intensive coaching to quickly rebuild expertise in primary roles



Voice of the Seasonal Customer

- Mechanisms for objective quantifiable customer feedback from every channel are critical
- Measure what is important to customers
 - Courtesy
 - Knowledge
 - First Call Resolution
 - Loyalty
- Trigger reporting immediately identifies points of customer suffering
- Robust process to save unsatisfied customers
- Quick strike coaching/evaluation process
- The three R's - Retraining/Reassignment/Removal
- Central VOC Evaluator for both in-house and outsourced agents



BPO Management

- RFP to 24 companies in 5 countries culminating in 5 site visits
- Agent selection includes BuySeasons accent review and listening skills assessment
- Train the trainer is completed by BuySeasons annually
- Leadership "in country" during season
- BuySeasons "owns" motivation; contests, food, discounts, social media

BPO Management

- Turnover below 20% annually in Manila
- 87% Net Promoter Score after offshore interaction (vs. 58% industry average offshore)
- Increases cost by 5.3%



"Captive off-shore centers are run by U.S. or local managers of the core company. These centers seem to be operating better than those belonging to companies that have both off-shored and outsourced....our experience suggests that creating two barriers (off-shored and outsourced) between your company and your customers is problematic."

Mary Murcott - *The Case for Repatriation of Contact Center Jobs Back to America*

Ramp Down

- Financially deserves the same focus as ramp up
- Plan, Plan, Plan, Plan
 - Clearly define ramp down needs by position
 - Have a process to end CSR seasons based on their performance/flexibility
 - Share space and staff with other departments/companies
 - Partner with local employers to find placement
- Job interviews, resume training, interview training for departing associates
- Exit surveys for seasonal team members
- Maintain the relationship with the seasonal team year round – Holiday cards, discount offers, etc.
- Hold post mortem meetings across all levels/departments

Conclusion

“Failing to Prepare is preparing to Fail”

-John Wooden



Questions?

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Thank you for attending this session!

Please remember to complete your session evaluation and hand it to the room monitor.
