The Roles and Responsibilities of a Call Center Staff

Learning Objectives

By the end of this chapter, you should be able to:

- Discuss the trends in call center development.
- Explain the importance of a call center in an organization.
- Identify common titles and responsibilities for call center staff.
- Define the competencies of a typical call center representative.
- Use your knowledge of the roles of a call center representative to help maintain a positive service culture.

Customer satisfaction is first and foremost a state of mind and action... an every minute of every day obsession.

Charles M. Cawley
President of MBNA of America, Inc.

The Customer Driven Company: Moving from Talk to Action

WHAT IS A CALL CENTER?

A call center is one of the many crucial operational units found in organizations of various sizes. According to Keith Dawson (Dawson 1988, 1), a call center is defined as "a physical location where calls are placed, or received, in high volume for the purpose of sales, marketing, customer service, telemarketing, technical support or other specialized business activity."

In a call center, trained representatives fulfill many of the jobs formerly found in an organization's customer service, accounting, and sales departments. In addition, through the use of the continually evolving types of technology
call center staff members now identify and respond to customer needs and related issues, provide informational functions, and sell a variety of products and services. For example, employees handle incoming (inbound) customer calls for such things as assistance, order processing, and administrative assistance (e.g., complaints or billing questions) as well as place calls (outbound) to customers in order to obtain information or sell products and services (e.g., customer satisfaction surveys, marketing, sales, and customer follow-up).

Call centers are actually a fairly modern phenomenon. In the late 1960s, the American Telephone and Telegraph (AT&T) company began the move toward using customer support centers via 800 numbers. As large and small companies began to realize the value of providing direct service contact and point of sales opportunities to customers, call centers started to become a standard throughout many organizations. Companies and customers began to recognize and embrace the convenience and savings of having service and sales delivered from remote locations.

Since the 1970s, improved computer and telephone systems have further allowed organizations to move to the next level of customer service by transferring tasks traditionally handled by employees during face-to-face and telephone exchanges to technology-based systems.

Many of the advances made in modern call center operation and management can be attributed to the efforts made by people such as A.K. Erlang (an engineer with Copenhagen Telephone Company). In 1917, he developed the Erlang C formula (Cleveland and Mayben 1997). This formula was a predecessor of several systems used today to forecast call ratios (calls per minute or per representative), calculate staffing requirements, schedule employees, and several other critical factors impacting call center success. Many call centers still use Erlangs' system today.

**Think About It . . .**

Think about calls you have made to, or received from, a call center representative or telemarketer. What types of customer service functions have you typically encountered or obtained in these interactions?

**TRENDS AFFECTING CALL CENTERS**

In addition to the advent of the toll-free numbers (including 800, 877, and 888 prefixes) there are many new technological innovations spurring further expansion and use of call centers. Due to enhanced capabilities, accessibility, and reduced costs of technology, even small businesses are able to tap into
the call center revolution. Organizations are realizing that with the explosion of the Internet, World Wide Web, and other emerging online networks, and the advances in computers and telephone technology, customer service can now be delivered far more efficiently and economically than in the past. One of the biggest advantages is convenience for the customer and organizations. From a customer standpoint, service and products can be obtained with the click of a computer mouse button or by dialing a telephone number. Organizations can disburse their customer service (call centers) efforts throughout the world, placing them in areas where capital expenditures (e.g., facilities, utilities, and telephone costs) are lower and labor pools are more readily available at reduced costs. No longer do customer service employees have to be located in expensive metropolitan areas or on-site in malls.

Additional trends relevant to call centers include use of voice and telephone touch tone responses to provide information to customers, e-mail and online forums for responding to customer requests and issues, and the marriage of the computer to televisions that will allow on-screen orders and service.

As part of the recognition of new technological capabilities and expansion of types of technological service delivery, some organizations have renamed their call centers as customer contact centers. Additionally, many organizations have already found ways to use interactive formats in which customers can connect with customer service employees at remote locations. For example, guests arriving at EP-COT Center at Walt Disney World in Orlando, Florida can use a touch screen television monitor inside the park to connect with a service representative (cast member). Through this system, they make dinner reservations at one of the park restaurants. Once the guest touches the screen, a connection is made and they interact with a cast member while the two view each other via a television monitor.

These trends are not likely to subside, which means that more call centers will come into existence in the future. According to the Cellular Telecommunications Industry Association in Washington, DC, roughly 28 percent (76 million) of the American population own cellular telephones. By the year 2010, it is projected that 70 percent of the population will be using wireless devices. This is in addition to the more than 94 percent of U.S. households that have telephones. As a result of this more Americans (and others throughout the world) are accessing telephone-related customer service. To handle this demand, there are currently an estimated 100,000 call centers in the United States, with over 3 million agents answering calls and serving customers who use technology to access organizations (Lucas 2000). The key to success in all of these call centers is a highly motivated, trained staff of frontline service providers.

Think About It...

What are some of your own experiences in dealing with customer service providers via technology (e.g., ordering items via the Internet, or calling a organization and encountering a touch

Continued on next page.
CALL CENTER STAFFING

Call Center Representatives have quickly become a crucial element in many organizations. Call center employees are often the first, and only, organizational representative with whom a customer interacts. With this contact can come a perception of professional excellence or ineptitude depending on the CSR's success in handling a situation. In many cases, organizations have come to recognize the importance of such workers and spend large amounts of money and effort in providing state of the art equipment, training, and incentives to recruit, hire, train, and retain qualified employees. One way of recognizing the importance of CSRs is to think of the organization as an inverted pyramid where they lead the organizational effort in customer satisfaction.

Depending on the organization, members of a call center may perform tasks specific to that business or industry or may provide more generic functions; however, in addition to providing key customer contact functions, a typical call center employee handles many fairly routine processes for an organization. These functions—order fulfillment, technical support, or application processing—are often enhanced with a variety of specialized units within the call center (e.g., foreign language specialists, technical experts, and product specialists). Each unit performs a specific task, serves a particular customer base, or supports a certain product or service line. Some typical call center job titles are:

- Account Executive
- Agent
- Associate
- Attendant
- Consumer Affairs Counselor
- Consultant
- Customer Service/Member Support Clerk
- Customer Service Representative (CSR)
- Data Entry/Order Clerk
- Inbound Telemarketing Specialist
CALL CENTER REPRESENTATIVE
COMPETENCIES

To perform well in a call center, employees must possess some very special competencies (capacities or abilities to perform certain tasks). Because of the specific requirements of the job, organizations must look for candidates possessing as many of these competencies as possible. It is essential that call center personnel have strong interpersonal skills, be organized, able to problem solve, and have a strong sense of the importance of their function to the organization. It is through possession of these competencies that successful call center employees can deliver quality service to customers who are historically used to more face-to-face, personalized service. Computer systems and other technology are only designed to process, transmit, and store information. It is the personal element and the competencies that call center representatives possess that determine the ultimate level of service delivered to the customer.

The competencies shown in Exhibit 1-1 are actually the basis for a checklist to screen candidates when recruiting call center employees. Before you look at Exhibit 1-1, take a few minutes to complete the following exercise.

Think About It . . .

What other call center job titles have you heard used by various organizations?

__________________________________________________________

__________________________________________________________

__________________________________________________________

__________________________________________________________
Think About It . . .

What skills or competencies do you feel that an effective call center representative should have? Why?

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**EXHIBIT 1-1**

**Typical Customer Contact Representative Competencies**

The following are some common competencies/abilities that employers look for in applicants desiring to work in a call center:

- **business acumen** (understanding the relationship between their jobs and how the business and customers are impacted)
- **call management** (controlling a call through effective communication techniques)
- **change management** (adapting to and handling changing situations and environments)
- **conflict resolution** (using effective interpersonal skills to resolve conflict situations)
- **cross-selling** (selling upgraded or additional products to existing customers)
- **decision making** (gathering and analyzing then applying appropriate interventions to resolve an issue or come to a decision)
- **interpersonal communication** (ability to actively listen, question appropriately, provide feedback, and use the skills outlined later in this course to build customer relationships)
- **managing diversity** (knowledge and ability to interact with a variety of people in the workplace)
- **managing stress** (maintaining a calm demeanor and mental state when situations and emotions escalate to higher levels)
- **multitasking/managing multiple priorities or assignments simultaneously** (e.g., receiving customer information over the telephone, while inputting/searching for data on the computer)
- **negotiating effectively** (effecting win-win outcomes)
- **organizing information and data** (ability to assemble and maintain information in a logical file system that can be accessed by themselves and others)
- **peer coaching** (offering support and guidance to coworkers)
- **problem solving** (identifying root causes through questioning and applying appropriate interventions to address them)
- **teaming with others** (ability to work effectively with others and contribute to team task accomplishment)
- **technical literacy** (basic knowledge of computer usage, Windows® applications, e-mail, and Internet and the ability to learn organization-specific software—requirement varies based on level of technical competence needed by an organization)
- **time management** (ability to use available time and resources to address assigned tasks and customer issues)
- **using call center technology** (e.g., computer, facsimile, printer/copier, database software)
TYPICAL CALL CENTER SERVICES

Opportunities to apply technology continue to grow each day, as do the types of services that can be provided through call centers. Based on the industry, type of products and/or services provided, size of the organization, management approach, and resources available, organizations can continue to grow and enhance their level of service.

The following list contains some of the more common customer service and related functions provided by call or customer contact center employees.

- **Billing support.** When customers have questions about a billing statement charge, interest rates, or other related topics, they can usually call in to speak to a service representative for information or log onto a company Website.

- **Collections.** Many organizations have in-house (internal) agents who call delinquent customers in an attempt to have them pay past due accounts. Other organizations (e.g., banks, credit card companies, credit lenders, and similar agencies) will sometimes sell their delinquent accounts to third party collection agencies in exchange for immediate cash recoupment. The third-party agencies are the ones that then follow-up with calls and letters to collect the debt.

- **Complaint resolution.** Complaint handling used to be provided by a customer physically traveling to an organization's complaint or customer service department or via correspondence (postal mail as it is now called). Today, most organizations provide access to a customer service representatives through telephone, facsimile (fax), mail, or the Internet in order to allow discussion of a problem related to a product or service provided by the organization. By offering multiple alternatives, customer needs and preferences can more readily be addressed. Additionally, depending on the method chosen by the customer, time and money can be saved by the organization since technology can often replace the need for employee intervention.

- **Document/order processing.** Organizations that deal with a membership base, or process forms, orders, or applications generally allow several ways for customers to accomplish these functions (e.g., warehouse clubs such as Sam's Club or COSTCO, credit companies, mortgage companies, organizations that do product warranty registration, or order processors). Customers can either mail in a form, go online and complete it on a Website, fax it in, or call to have an agent of the organization take the information and complete the form for them.

- **Inquiry services.** Some organizations program responses to frequently asked customer questions (FAQs) into a system that can deliver the answers electronically via a Website, through Fax-on-demand, Interactive Voice Response (IVR), or Online Internet Fulfillment systems. These systems will be explained in more detail in the following section.

- **Telemarketing or teleservices.** Such employees might be internal or contracted through another organization. Their role may be outbound calling to sell products or services or inbound call receivers who answer customer
questions about current products and services being used, with an attempt to cross-sell or up-sell the customer to an additional or higher level/priced product or service. Among other additional functions performed by CSRs in these positions are prescreening possible customers or setting up sales calls for sales representatives.

- **Technical Support/Help Desk.** Virtually every organization that develops products (e.g., electronic equipment, software, electrical appliances, and craft tools) or offers services now provide a toll free number for customers to use for accessing information and assistance related to assembly, use, warranty registration, benefits, and various other functions. In many cases customer services are provided by employees of the organization making the products or selling services, however, in numerous other instances the responsibility for customer service is subcontracted or outsourced to a third-party vendor (service bureau). Such third-party companies often provide similar help desk services for multiple clients. For example, many of the software help desks that customers call for assistance have units set up within their call center to handle customers for a variety of software manufacturers.

The staff of such third-party vendors is typically trained on the client organization's products and services. Customers calling in usually never know they were speaking with a third-party representative since these call handlers answer with client's product company name.

### Think About It . . .

What other functions have you seen provided by call center representatives?

### TYPICAL CALL CENTER TECHNOLOGY

There are many types of technology that have aided the growth of today's multichannel customer contact or call centers. Each year brings new and more advanced ways of getting and providing information in the customer service arena. Technology will be discussed in more detail in Chapter 5; however, some of the more common types of call center technology include:

- **Automatic Call Distribution (ACD) systems.** Through an ACD unit incoming calls can be automatically routed to the next available agent when a customer calls an organization and all lines are in use.
- **E-mail management/response systems.** Customers and service representatives can exchange information quickly through the use of e-mail. This
time saving mechanism can provide answers and data attachments to a customer much faster than using a facsimile or postal mail system.

- **Fax-on-demand.** This equipment allows customers to call a telephone number, listen to a recording, select a code for a form or other information desired, enter their own fax number, then have the information delivered to their fax once they hang up.

- **Interactive Voice Response (IVR) systems.** Through IVR, customers can call in and, through punching of specified telephone keypad numbers, get information or answers to questions.

- **Internet Callback systems.** Customers who are browsing the Internet can enter their telephone number on an organization's Website, then continue to browse. Their entry triggers a "predictive dialing system" which automatically redials the customer's telephone number when an agent becomes available, then routes the request to that agent who speaks with the customer.

- **Interactive Web Chat.** Such an option allows customers and service providers to have a dialog online via the Internet in order to exchange information.

- **Online Information Fulfillment systems.** Information can be provided on an organizational Website, which is accessed by customers. They can request information or contact an agent via e-mail.

- **Voice Mail.** Recording systems can be used to collect messages when an agent or representative is not available. The agents can return the call later.
As operational units within organizations, call centers or customer contact centers are quickly becoming an important part of service delivery. With specially trained employees and a variety of technology being used to identify and satisfy customer needs, call centers are quickly adding a new element to the service profession.

Ever since managers began to realize that telephones, and now computer technology, could expand the options available to provide information and services to customers in remote locations, they have been more willing to invest in the development of call centers. And, with the increasing numbers of people who are using cell phones, the Internet, and other technology, this growth is likely to continue in the future.

Today's call center representatives provide many of the functions formerly handled in face-to-face interactions with customers. Call center representatives provide such functions as collections, order processing and fulfillment, inquiry services, telemarketing or teleservices, billing support, complaint resolution, sales, and technical support.

To effectively handle their functions, call center representatives must possess a variety of interpersonal and technical competencies. Some of the more common types of call center technology include ACD systems, e-mail management/response systems, fax-on-demand, IVR systems, Internet callback systems, interactive web chat, online information fulfillment systems, and voice mail.
1. Which of the following best defines a call center?
(a) A business unit that provides basic customer service
(b) A business unit that answers customer questions and provides information
(c) An operation unit that handles many of the functions traditionally found in customer service, accounting, and sales departments
(d) An operational unit that provides technical support to customers
1. (c)

2. Who was A.K. Erlang?
(a) Inventor of the modern call center
(b) An engineer who developed a formula for forecasting call ratios
(c) The first person to recognize the value of call centers in delivering customer service
(d) A nineteenth century inventor
2. (b)

3. One of the biggest advantages of call centers to organizations and customers is:
(a) ease of use.
(b) reduced expenditure.
(c) convenience.
(d) creativity.
3. (c)
4. Which is not a competency needed by typical call center employees? 4. (a)
   (a) Cost analysis ability
   (b) Business acumen
   (c) Conflict resolution skills
   (d) Interpersonal communication skills

5. Based on the text, what is meant by the phrase "billing support?" 5. (d)
   (a) Processing and mailing customer account statements
   (b) Receiving payments from customers
   (c) Calling customers to encourage them to make payments
   (d) Responding to customer questions concerning billing charges, interest rates, or other related topics