

This document is the introduction to Centerserve's "Call Center Planning and Design" Toolkit – visit http://www.call-center.net/planninganddesign_main.htm



Getting Started

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Introduction

Thank you for purchasing the Call Center Planning and Design Toolkit. This toolkit provides:

- a comprehensive **planning checklist** and design **guidelines** for creating a world-class call center (or redesigning the call center you have)
- an **approach** and **tools** to facilitate the successful implementation of your contact center project ranging from strategy and processes to technology and facilities design

The **Getting Started** section provides you with a “1-2-3” framework to guide your thinking. These three areas include:

1. **Contact Center Model**: a high-level framework for thinking about the five main facets of setting up a contact center.
2. **Planning Roadmap**: a one-page representation, based on the Contact Center Model, identifying the critical topics in each area.
3. **Master Planning Guide**: a worksheet and checklist that guides you through:
 - identifying the activities you will undertake to get you started on each subject
 - assigning personnel to those activities

To support the Master Planning Guide, the toolkit provides an overview of each key element for call center planning, ranging from business strategy considerations,

process planning, technology, human resources and facilities design.

How this toolkit is organized

Take a moment to become familiar with how the pieces of this toolkit fit together:

- Behind each of the six tabs is a Table of Contents listing the sections included in that part of the toolkit. The tab sections include:
 - **Getting started** (includes planning and design checklists)
 - **Business strategy**
 - **Processes**
 - **Technology**
 - **Human resources**
 - **Facilities**
- The Planning Roadmap (in the front inside pocket of binder) follows the same outline as the Tabs and Sections
- The Master Planning Guide (within the Getting Started section) also follows the same outline

What each section contains

To facilitate usage, each section follows the same general outline after the **Getting Started** tab. Content may vary depending on the subject matter. Typical topics covered are:

- definitions and examples of concept being discussed
- benefits
- checklist to get you started
- where to get additional information
- sample document outlines (where appropriate)

Using the Toolkit

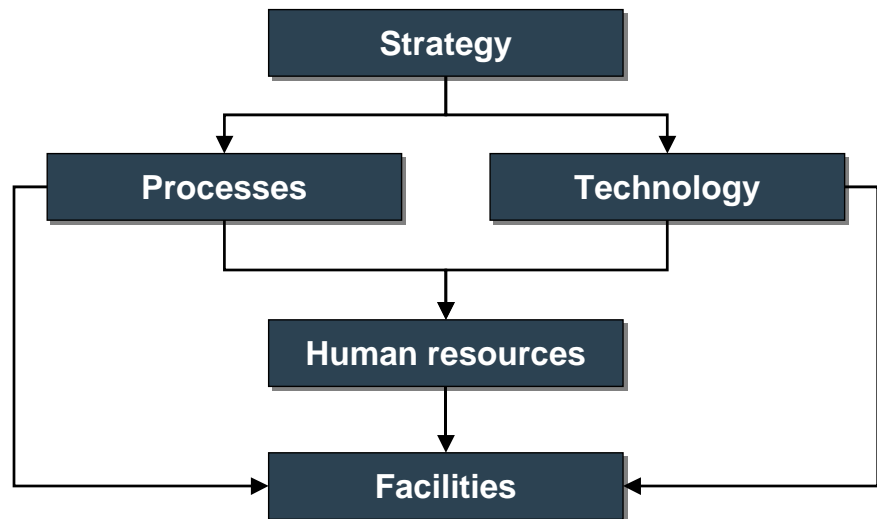
This toolkit is applicable for the following situations:

1. You are starting a completely **new** call center.
2. You have existing call center(s) and need to open **another** one.
3. You are taking over the **implementation** management of a call center project from someone else.
4. You are **managing** a portion of a new call center implementation.
5. You are **reengineering** an existing call center (you want to create a world-class contact center for your organization).

The Contact Center Model

The first concept to master is the Contact Center Model. It's a high-level framework for thinking about the five main facets of setting up a contact center. The model is useful to help categorize the required activities. The categories below parallel the organization of the Planning Roadmap, the Master Planning Guide and this toolkit.

Defining the business **strategy** is the basis for defining the **processes** and choosing the **technology**. **Human resource** policies require input from the processes and the technology, and all three will guide **facilities** selection and design.



Strategy

Your business strategy is the critical starting point for planning a call center. Before selecting the site for your call center, or designing processes, systems or organizational structures, you should define the **role** that the call center will play in the success of your organization. Critical questions include:

- What is the **mission** of our call center?
- What is our **competitive position**?
- What are the needs and expectations of our **customers**?
- What are the primary **goals** and objectives for the center?
- What is our customer **contact strategy**?

The details around business strategy planning are covered in the second tab of this toolkit.

Processes

The core of your call center operation will be your business processes. You will define:

- **why** and **how** customers will contact you
- how your **agents** will handle these interactions
- how your call center will handle **day-to-day** business transactions and operations
- how you will manage your call center **staff** and scheduling

Processes are discussed in the third tab of this toolkit.

Technology

Technology will play a key role in the success of your call center. Once you have defined how customer interactions and business processes will be handled, you will need to design the appropriate technologies, select the vendors, install the systems, and train the support personnel. Key technology areas include:

- **Voice:** Telephone Switch, Voice Network, Contact Routing, Interactive Voice Response (IVR)
- **Data:** Workstations, Computer Applications and databases, Customer Relationship Management (CRM) Tools, Computer Telephony Integration (CTI)
- **Web:** Website, Email, Email Management, Web Integration (text chat, web calls, collaboration)
- **Management:** Reporting, Workforce Management, Quality Monitoring

Technology is covered in the fourth tab of this toolkit.

Human Resources

The next step will be to define all the “**people**” elements for your center. The wide range of human resources activities falls in the following categories:

- **Organization:** organizational design, job descriptions
- **Personnel acquisition:** recruiting, hiring, and training
- **Personnel management:** defining career paths to encourage employee retention, performance evaluation procedures
- **Communications:** internal and external

In the fifth tab of the toolkit you will learn how to plan for each of these HR areas.

Facilities

The last key element of the call center model is the facilities. Setting up the facilities involves:

- selecting the city, **location**, and **size** of the call center
- selecting **contractors** and vendors
- designing the interior **space** and furnishing it

Many factors should be considered in facility and site selection. These are covered in the last tab of this toolkit.

Pulling it all together

The five categories are distinct yet **inter-dependent**. Each requires special knowledge and expertise. All of these activities and their interdependencies will be reflected in the Planning Roadmap and tracked in the Master Planning Guide and the Project Plan that are discussed in this Getting Started section. We provide you with checklists and guidelines to ensure that **all** critical elements are addressed while planning for your call center.

Now that you have grasped the concept of the Contact Center Model, you can move on to becoming familiar with the Planning Roadmap.

The Planning Roadmap

Purpose of the Roadmap

The Planning Roadmap serves as your guide to keep each activity in focus. The roadmap will:

- identify the **subjects** covered within the five main facets of setting up a call center
- map out the **sequencing** of activities:
 - The strategy needs to be defined before contact processes can be identified.
 - Process and technology design go hand-in-hand and often require an iterative approach.
 - Processes, technology and HR considerations can all impact site selection.

How to use the Roadmap

Remove the Planning Roadmap from the front inside pocket of the toolkit binder and review it. The five boxes correspond to the five boxes in the Contact Center Model. The arrows indicate that:

- The **Strategy** activities are completed first and will guide the definition of the call center ‘processes’ and the selection of the needed ‘technology,’ (e.g., your customer contact strategy must be defined before you define the processes and contact routing). In some cases, the Processes and Technology activities can be worked in parallel.
- Both the **Processes** and the **Technology** activities are input to the **Human Resources** activities (e.g., in order to design the organization and the training material, the contact processes and the various groups handling them need to be defined).
- Finally, the **Facilities** selection and design require input from all three previous sections (e.g., to design the call center, you must know the staff requirements).

Note how the Planning Roadmap areas mirror the Table of Contents behind each tab. It is also the basis of the Master Planning Guide discussed in the next section.

Keep your Planning Roadmap handy as you review each subject in this toolkit to keep yourself oriented as to where this activity fits in the total scheme. The Planning Roadmap is included in the inside front cover of the toolkit and shown in the figure on the following page.

The complete toolkit provides a detailed Roadmap figure to guide your planning process.

The Master Planning Guide

To help you review this section, remove the Master Planning Guide pages from the end of this section. Note that this worksheet provides five columns as described below:

Column	Description
Topic	Corresponds to the topics shown in the Planning Roadmap and presented in each section of the toolkit
To get you started	A checklist of activities to get you on the right track
Complete/To be done/NA	An indicator whether the activity listed is completed, to be done, or not applicable in your situation
Priority	A rating of the activity based on the priority (1 = must be started immediately, 2 = start next, 3 = can or must wait)
Notes/Personnel Assignment	A place to note any ideas or questions you have about the activity, preliminary timelines, and possible persons to assign

Purpose of the Master Planning Guide

Receiving an assignment as daunting as setting up a call center is sure to raise the anxiety level of even the best of us. The mind-numbing question is **“Where do I start?”** That’s where the Master Planning Guide becomes your guide.

The Master Planning Guide is designed to:

- get you started quickly
- serve as the basis for a preliminary brainstorming session, either in the privacy of your own office or with a few key team members
- serve as the basis for creating your Project Plan
- provide a master checklist so that you do not overlook key activities or areas needed for successful call center implementation.

Using the Master Planning Guide

How you use the Master Planning Guide depends on your role and the work you have been assigned to complete. Generally, you will:

1. Review the **Call Center Model** and **Planning Roadmap** (earlier in this section).
2. Read the rest of the toolkit to fully understand the **subjects** to be addressed and the activities involved.
3. Work through the **Master Planning Guide Worksheet**, either on paper or electronically

Column	Enter. . .
Completed/To be done/NA	Comp = completed Do = to be done NA = not applicable
Priority	1 = must be started immediately 2 = start next 3 = can or must wait
Notes /Personnel Assignment	Questions, ideas, timeframes, names

The completed Master Planning Guide will give you a **head start** toward setting up and managing your Project Plan.

Note: the checklist items in the Master Planning Guide are the same items listed at the end of each **section** within the toolkit. They are compiled in the Master Planning Guide to provide a consolidated checklist for the project manager.

The complete toolkit provides a full Master Planning Guide with 12 pages of considerations for designing or reengineering your contact center.

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