

The Call Tracking System

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ABSTRACT

St. Francis Xavier University is an undergraduate university situated in small town Nova Scotia. The intent of this paper is to present an overview of the support process utilized in the Technology Support Group (TSG) at StFX, steps taken to improve training, communication, and spirit within the department, and changes to the support process to improve response time and accountability.

Taking advantage of staff turnover, a multi-stage reorganization of roles and responsibilities created an environment where ideas, formerly unspoken, have made a difference in time-to-resolution of requests and increased satisfaction of staff and customers.

Categories and Subject Descriptors

K.6.1 [Management of Computing and Information Systems]: Project and People Management - staffing, strategic information systems planning, training.

General Terms: Management, Human Factors.

Keywords

Call Tracking, helpdesk, training, communication, organization.

1. INTRODUCTION

TSG Customer Care is responsible for the Contact Centre, Training, and Supporting Desktop Computing, ResNet, Telecom, and Computer Labs.

All requests are reported and tracked through the Contact Centre and assigned to technical staff as required.

2. FIRST ATTEMPTS

2.1 Training Student Staff

As an opening move, we created a student staff training program.

Student training prior to the new millennium consisted of on-the-job training where students were expected to job shadow and learn as they worked. That had been considered adequate up to a point. Low quality work was excused due to the steep learning

curve and full-time staff dealt with any of the more complicated problem types. We now believe that we were underestimating the capabilities of student staff members.

In 2000, new student staff members were provided with a few hours of training in call logging, the premise being that by teaching them how to use the software, they would improve their information gathering skills. We also made many improvements to the data collection screens, hoping that the changes to the software interface would force them to gather required details. They did improve their problem-solving skills; however, it became apparent that they did not seem to be moving toward resolving calls on their own. We decided that more training was required; this time to demonstrate the reasoning behind why we log calls and why specific information is necessary.

By the beginning of the school year in 2001, students were offered 3 complete days of training. The training was expanded to include the complete call tracking process as well as policies and procedures governing TSG staff and the work of the TSG. Each student was provided with a manual detailing his or her role and responsibilities as a student technician.

Both customers and full-time TSG staff have indicated a higher level of satisfaction with the work of our student staff.

2.2 Tech Conference

On Friday, June 8th of 2001, we had our 1st annual Tech-In-X technology forum. It was an idea suggested by a group of full-time staff as a means to increase communication among the different divisions of the TSG. It was noted that some staff members never really get to know each other. The event included presentations by volunteer staff and managers, a short bio of each staff member, meals and a bowling party. It was a fun activity that garnered full participation. This event was also a real success in terms of opening the minds of staff within the different TSG groups to understand the work of the people in other groups.

Tech-In-X-For 2002 is planned for the week of October 7th to 11th: Customer Service Week!

3. REBUILDING CUSTOMER CARE

It is difficult, at best, to change personnel and redefine roles. However, a number of customer care staff left us for other opportunities, making a major change inevitable.

We made the following changes with the expected results listed:

1. Divide the responsibilities of the Contact Centre Coordinator among three people and select a person to fill the role of Contact Centre Coordinator from the existing staff.

Result: The person will focus on customer request resolution, identify problems with the call tracking process, and supervise and train student staff in the Contact Centre.

2. Select a Computer Lab Coordinator from the existing staff. This position had existed in the past but was combined with the Contact Centre Coordinator role three years earlier.

Result: This is the TSG liaison for academic issues. He or she creates technology enabled teaching space, meets with Student Union and meets with faculty to discuss issues around teaching and computer lab spaces.

3. Select a Senior Technician from the existing staff. This position had always been part of the Contact Centre Coordinator's responsibilities.

Result: The desktop support technicians will have a supervisor with superior technical abilities who will focus on their needs. The person will make day-to-day decisions around technical problems and priorities.

4. Pool resources around Telecommunications, Training, Student Payroll, HEAT Maintenance, and Billing to form an Operational Support Group.

Result: Streamline the work in these areas to make it possible for three people to do what was formerly done by five. Some of the changes include reducing the time spent on training, building ResNet costs into residence fees (a huge time saving), and limiting the time spent on some service issues in Telecommunications.

To actually make these changes happen, several staff changed jobs, even moving from server support to customer care. On the day of the move, everyone participating in the move was treated to lunch, where a key swap was organized. Phone moves and mail delivery were also arranged the same day.

Each of the expected results has been achieved with a good measure of success.

4. IMPROVING AUTOMATION

One of the driving factors for change was that we had to close calls more quickly. In the life cycle of a call, in our old system, it wasn't closed until some follow-up had been done with the customer and the customer signed off as happy with the resolution. However, when we looked at the open calls in our system we found many open calls that were finished except for the follow-up. We could be fairly sure that customer was satisfied because weeks had gone by with no further contact, but our process didn't allow us to close the call. Sometimes the follow-up was not done because the customer hadn't replied to an e-mail or phone call, and sometimes it was because the technician assigned to the call was busy. A little more analysis showed us that the person resources required to individually follow-up every call were more than we would ever have.

The system we designed has the calls closed earlier in the process and has automated follow-up with the customer.

A Tracker is assigned to every call, usually the assigned tech, but it doesn't have to be if it makes sense for someone else to be the Tracker. The Tracker is responsible for closing the call. By ensuring that only one person is responsible for closing each call, we avoid confusion and every call is handled in the most efficient way possible.

Each technician has their own Call Group defined. Only calls assigned to that technician and calls that they have been designated as Tracker will appear in that group. As a result each technician sees only those calls that are important to him or her.

The call tracking process has a decision loop that ensures problems are well understood before being assigned. If the supervising technician receives a call from the contact center coordinator that he feels needs to be better defined, he immediately addresses the issue with the contact center coordinator. Because control of call routing is handled by these two people every time, we can be sure that each problem is handled consistently. And, because these two positions are well documented, another staff member can cover for them when they're on vacation or leave.

The end product is one that is very simple and has the following good properties:

1. Student staff have clear goals and available guidance to achieve them;
2. There is quality control that ensures incomplete requests never get assigned to a technician, reducing the possibility of the call languishing on the "I don't know" list;
3. Calls of a technical nature are assigned by a senior technician, ensuring that it gets into the hands of a person with the skills for the task;
4. A Tracker is assigned to every call, making one person responsible for closing the call to reduce confusion;
5. Calls assigned outside of Customer Care follow the same process as those inside; again reducing confusion about what to do next;
6. The Tracker updates a "Note to Customer" field when all assignments have been resolved and the note is sent to the customer by e-mail as part of the follow-up;
7. The Tracker closes the call as soon as all assignments have been resolved, making statistics more representative;
8. An automated e-mail survey is sent to the customer 24 hours after the call is closed;
9. If a customer responds negatively to the survey, the Contact Centre Coordinator makes contact with the customer and re-opens the call if necessary.

5. THE FUTURE

September 2002 will bring a new group of student staff and some new full-time staff. We will continue to monitor our success and make changes as necessary. One area that we know needs attention is performance measurement. That we send e-mail surveys to each customer is great, and the level of response has exceeded expectations. However, we need to find more and better ways to measure our successes and failures. We must also begin to publish the results so that our user community is aware of how well we run our department!