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## A Culture of Change: How to Use Change Management in your Contact Center

By Micah Schrom, CWPP, OptumHealth

Change is constant in a contact center. Being able to manage change and have staff accept change can be a difficult task. As a workforce management professional, I'm sure you're aware of how to use your workforce management tools and applications to drive change. But to be truly successful you need to not only change the technology and metrics that drive your contact center, you also need to change the behaviors and culture as well—in essence creating transformational change.

This article will examine steps you can incorporate into your projects to drive the change in culture needed for workforce management processes to have the most impact. This article is put into the context of using change management to implement performance-based scheduling. However, these strategies can be applied to any change project in your contact center.

### 1. You need an organization that is “change ready.”

First, to develop successful transformational change management strategies for any project, you must first have a “change ready” organization. If your organization isn't ready for change, you cannot effectively implement change, whether it be a culture change or a technology change. To do so, you must determine that:

- **You have leaders in place that are respected and effective.** You need real leaders that can penetrate the culture and status-quo of your organization and are effective change agents.
- **There must be a motivation to change.** Rarely does change occur just for the sake of changing something—there must be a reason for it (your current seniority-based scheduling system is alienating high performing agents with less experience or is rewarding low performing long-term employees). There must be a sense of urgency and your leaders need to be willing to challenge the status-quo and complacency that exists currently.
- **You need a non-hierarchical structure.** You need to break down the bureaucracy and push change and decision-making through lower levels of your organization, empowering your staff and giving them a voice in an environment of free communication. Your frontline leadership team needs to be able to reward staff and make operational decisions without always needing senior leadership's approval.
- **What's the WHY for change?** Like I said, rarely does change happen just for the sake of change, so with that said, you need to identify WHY this change is needed.
- **W.I.F.M — What's In it For Me!?** You need to identify how each level

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of your organization will benefit from the change and communicate it effectively and passionately. This must be something they can realize and be able to “feel.” In this case moving to performance-based scheduling will give your agents more “perks” or more choice about scheduling when they’re more productive, thereby giving them an incentive to work harder.

## 2. You must have a shared vision and commitment for change.

Think about it — without vision, how do you know where you’re going (literally and figuratively)? You don’t. Before you can implement change in your contact center, you must begin to shape a shared vision for the change. Notice I said shared vision so that everyone knows what the direction will be and agrees that it is the best course to follow. To accomplish a shared vision:

- **Mobilize your cross-functional team.** This team will need to be energetic — nothing moves on Earth without energy and neither will your project if you don’t have it.
- **Develop your shared vision of what the change should look like and be sure that all stakeholders have bought into this vision.** To do so, you must universally agree what “performance-based” means. While WFM may agree that performance should be ranked by schedule adherence, operations leaders may believe that calls per hour is more important. As a group you must agree and realistically performance-based scheduling shouldn’t be one-sided and should look at more “balanced” performance combining various metrics including quality. If you only base it on schedule adherence or calls per hour, it could have a negative impact on the quality of the calls, so balance is important. Either way, remember, this vision needs to be shared and agreed upon.
- **Identify your leadership.** Most of the time you need a champion (senior leader), and you need to identify who owns the processes that are affected as they will be instrumental in driving and monitoring your change efforts. Your process owners will most likely include the contact center leader responsible for day-to-day operations (e.g., contact center manager) as well as workforce management leadership (e.g., workforce manager).

## 3. You must determine what is needed for change to occur.

Now that you have a solid team, solid leaders, and have created a solid shared vision, you need to determine what it will take in order to drive your change initiative. Below are three things you should do to identify what needs to be done to reach your end-state.

- **Identify all of the actions that need to be taken in order to implement your change.** This will be more defined in step 5.
- **Determine how you will motivate agents to change.** What enablers will be put in place to help achieve the change? These should be scalable and long term. Enablers don’t need to be monetary or overt — just creating a culture of recognizing people goes a long way. When migrating to performance-based scheduling, the reward is generally the outcome itself. Being a high performing agent means more choice in scheduling, but you should also be sure front line leaders are acknowledging staff for being high performers.
- **Analyze your risk.** All good projects have a risk management plan in place. This plan will help identify risk up front, allow you to analyze the impact of that risk, and develop a response plan for when steps in your processes fail. A Failure Modes & Effect Analysis (FMEA) diagram is a great example of a risk management tool. When you’re implementing

performance-based scheduling some obvious risk is what happens if your data is inaccurate, thereby giving the wrong preference of schedules to agents as well as how. You need to be able to determine how that's identified, how severe it is, and how often it might occur and how to mitigate or deal with that risk. You should look at every step of your scheduling process to identify potential process failures. These will give you a plan of attack when things go wrong.

#### 4. You must design what your end-state should look like.

To create change, you must identify what success looks like. In designing your end-state, here are some things to keep in mind:

- **Your solution should be customized to meet your organizations needs.** Trying to implement a solution based on "industry standards" or a canned solution may very well not work as intended because you would have not identified the variables and unique elements that exist in your organization. Another consideration is that workforce management is a concept, not an application. You should be building your end-state around what your needs are, not what your application can do.
- **Your change should not be "head on."** One way to stop your project in its tracks is to try and force a solution down their throats. With your shared vision and cross functional teams, allow them to drive change and promote it at each level. People are more receptive to changes that are driven at their level then those driven by an executive or senior leader.
- **Looking back at your enablers, how will these be deployed in your organization?** Identify what processes and enablers will be put into place to sustain your end-state long term. This could be as simple as posting your top performers names to a bulletin board or on your intranet. Regardless of what they are, they should be sustainable and scalable across your contact center.
- **Identify the impact of success (both qualitatively and quantitatively).** It's important to make sure you can measure success and that your measures are actually going to drive the change you want. Like I said in the beginning, there must be a reason to change. When you move to performance-based scheduling, your impact should be an increase in performance and a more performance-driven culture. You should try and put a target number on how much of an increase you should see. For example, a 10% increase in schedule adherence and calls per hour.
- **You should have an end-state with a narrow and well-defined scope and you need to stick to it.** Don't try to boil the ocean. You need to create a plan that is achievable and trying to change everything all at once isn't. In this case, we are only implementing performance-based scheduling. We are targeting an increase in productivity as a result of moving to performance-based schedules, but we wouldn't try to implement strategies to increase performance that have nothing to do with schedules — you need to stay in scope to measure success accurately and keep your project in line.
- **At the end of this, you should have a defined "charter" listing.** Who are your stakeholders, what is your problem, what does success look like, and what measurable results will be achieved through this project (e.g., cost savings, cost avoidance, improved productivity, reduced attrition)?

#### 5. Formalize Your Plan!

Now that you have your team together, created your shared vision, and identified what success will look like, you can now develop your implementation plan. Having a comprehensive plan can make all the difference in whether your change initiative will be successful or not. To develop your implementation plan, you should:

- **Include a comprehensive list of all of the activities that need to take place in order for you to implement change with clear roles of who's responsible for each task.** This should include all of the steps (changes to your WFM application, reporting, training, cultural training) that needs to be done and by whom. This should be a granular list so be sure everything is done. Don't assume something will get done — document it.
- **Your plan should be broken out into phases with achievable milestones attached to them.** For example, you may have a phase where you're defining your charter and gathering your information, then maybe a phase where you're analyzing data and building your solution. You may want to include a pilot phase if you have a large call center to be sure your end state will drive the required results. And also include your implementation and post-implementation phases so you can deploy and re-tool your plan for the long term.
- **Include your Risk Management Plan.**
- **As part of your planning, address how you will work with those who are resistant to change (either actively or passively resistant).** People naturally react to change in a "grieving process" where they are in shock, become defensive, begin to acknowledge change, and then adapt to the changes begin made (Form, Storm, Norm, Perform). You should understand that change is not a "hard cut" into a new process — there will be a natural transition period. Most likely at least half your staff will resist the change or be hesitant and this will generally be those who previously benefited from the previous set-up. If you're moving from seniority-based schedules, your senior agents (particularly those who don't perform well) and your under-performing staff will be the most resistant up front and you need to be prepared to work with them constructively.
- **A key part of your implementation plan is including activities needed to prepare the organization for your implementation.** This could include town hall meetings, training, coaching, etc. Agents should understand where they stand under the current scheduling system, how this will change with the new system and help them develop steps to get to where they need to be well before the new system takes effect.

## 6. Implement Your Changes.

At this point you will be executing your implementation plan and all of your other plans (e.g., enablers, risk management, communication plan). Over the course of implementing your change, you should be sure to:

- **Communicate, Communicate, Communicate!** Not doing so can create a great amount of frustration and misunderstanding that are completely avoidable.
- **Listen!** Be sure you are addressing those who are resistant and giving people the opportunity to voice their opinions without judgment.
- **Reinforce your shared vision and communicate this in multiple ways (words, memos, graphics).** Having a cross-functional project team helps to establish that this change isn't "top down," it is a coalition effort and one in the best interests of the agents, the business, and customers overall.

- **Be sure you are executing consistently.** Be sure people who are succeeding are being recognized for it and people can feel that the new end-state is succeeding.
- **Address issues quickly and modify your plan as needed to adapt to issues that occur.** For example, if you see agents cheating the system or measurements that aren't accurate, you need to work quickly to address those issues and make any changes to your plan.

#### 7. You must be able to sustain change and continuously improve.

Once you've successfully implemented your change initiative, you must now prepare to sustain these changes. To do so:

- **Create a Control Plan on what success looks like and what the response is when your process fails.** Your control plan should include key metrics, how they're captured, who captures them and how frequently, and what you do when they're not met. The goal should be to create a truly competitive system, not one where the top agents stay at the top and the ones at the bottom stay at the bottom. Your control plan helps to ensure you're consistently executing and have a plan to fix issues that occur post-implementation.
- **Identify how you will support continuous training to staff to support continued growth.** This may require training staff on multi-tasking, improving time management, or other activities to help drive improved performance.
- **With your cross-functional team, continue meeting to identify areas of improvement and opportunities to improve your processes.** This will give you the voices from all levels of the call center and allow to you modify your scheduling plan as necessary.
- **Identify any lessons learned or things that could have been done differently.** These lessons should be integrated into your long term strategy for sustaining your changes.
- **Develop best practices.** This will ensure that future changes meet a predefined set of criteria that have been proven to work and that support your overall operational strategy.

And finally, don't give up! If you hit a stopping point or obstacle, work to remove it. Address your plan and re-tool it as necessary to get the desired results you're looking for. Above all else, remember that you can build great workforce management processes, but if no one believes in them, the value is lost. You need both a strong technical and cultural strategy working together for true long term success.

*Micah Schrom, CWPP is an Associate Project Manager at OptumHealth and is a Certified Workforce Planning Professional (CWPP). He can be reached at [micah.schrom@optumhealth.com](mailto:micah.schrom@optumhealth.com).*

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