

Good morning, gentlemen. And ladies. How has your experience as customers been lately? Good? Mediocre? Or just downright hair-tearingly atrocious?

I ask because, like many of you reading this article, I suspect that we wear two hats. As Managers, consultants, or even academics, we are busy advising companies on how to tackle issues of Customer Experience. We are aware of how central it is to commercial success: and we are either measuring the gap between what is intended and what is achieved (auditing): or we are busy implementing new systems to enhance Customer experience.

At the same time, we are also customers ourselves. We use services, buy goods, and have experiences along with the rest of the populace. The difference, I would hazard, is a certain schizophrenia: as customers, you are busy experiencing; whilst as professionals, you are running an internal commentary on that experience.

I know that I do. Even as I suffer the latest episode in some ongoing piece of idiocy, I find myself identifying the process factors that have almost certainly gone wrong in order to bring about the result that is now in front of me.

In that, I suspect I am far from alone. I am also a regular reader of www.mycustomer.com. Formerly the CRM-Forum, MyCustomer.com is an independently managed website, claiming to bring together “an online network of over 70,000 CRM, marketing, C-Level and IT professionals”.

One of their editors – Stuart Lachlan – seems on occasion to have woken up and borrowed my life. At least, if the experiences he tells of are any indicator.

There are the obvious instances of poor service which, I imagine, we all expect. If you eat out at restaurants regularly, then it is inevitable that on one or two occasions you will encounter a waiter who appears to have it in for you. Perhaps they are having a bad day. Perhaps you remind them of a particularly recalcitrant customer that they served the night before. But this is not out of the ordinary.

What does seem to be happening, more and more, are instances where the very process put in place by your supplier/service provider is almost designed to create problems for the average user trying to do anything other than what the system is explicitly designed for.

An example: a year or so back, I comprehensively left my Bank (the Halifax). I had paid a cheque into one account – but it appeared in another. For various reasons, I knew that it was not possible that I had specified that account, so it was some error within their process. So far so ordinary. I expect such mistakes to occur from time to time: and therefore the simplest thing is to put it right and move on.

The problem was that I discovered this fact “out of hours”. I had a helpline number to call, so I called it, only to be greeted by the now standard demand for personal details plus security code. I don’t have the latter. “But we sent it to you”. Very likely: but since I don’t ordinarily do telephone banking, I have no idea where it is.

Besides: all I was asking was that the organisation get a message through to the branch in question asking them to call me and discuss the matter. They have my phone number on file. They have all manner of details. But this was not to be.

We went round and round the issue a few times. However, the helpline person (and subsequently, her supervisor) were not moved: "procedure" meant that they could not/would not even pass on a message. At various times within the call, they gave different reasons for this – which I found irritating: it was "illegal"; they did not possess access to internal e-mail; and so on.

In the end, I gave up in disgust. It was not the only incident of this sort I had had with the Halifax: a similar catch-22 had arisen about six months earlier; and the way in which they then handled the complaint was, initially, seriously deficient. (Although, all praise due, when the complaint was finally escalated, it was handled well: but too late, because by that time, I had already moved savings, current and mortgage accounts elsewhere).

So what are the lessons?

It is always unwise to generalise from anecdote. However, this one is chosen because it illustrates several trends that I have encountered with increasing frequency over the last couple of years.

First is the ever-present shade of the Data Protection Act (DPA). It really is not a major barrier to doing business. It requires that companies put in place some basic safeguards to take care of data and, further, that they obtain permission before doing anything "unexpected" with that data.

Yet, from an initial position of ignoring the DPA in totality, far too many companies now appear to be possessed by it. This is so much a problem that the Information Commissioner now has a section on his web site detailing urban myths where the DPA has been cited, but where the DPA is NOT relevant ("Data Protection Myths and Realities", downloadable as a .pdf from www.ico.gov.uk).

It is over-reaction, and it is getting in the way of doing business – although I have a suspicion that responsibility for this state of affairs lies, at least in part, with ever more litigious consumers.

Much more worrying is the over-arching philosophy that has informed the move to call centring and process standardisation in general. I recently reviewed a series of case studies put forward by entrants for a prestigious crm award.

Quite a few of these (mostly in public service areas) had executed a similar project. It involved standardising and streamlining services: formalising these within a call centre environment; and then cutting the more senior managers off from that environment in order to "free up the back office to do its core job". That last phrase appeared so often that I began to wonder if it did not come from the sales literature of some of the call centre suppliers.

(They had all, also, managed to deliver these projects without directly evaluating the effect on customers: either they had opted for the somewhat discredited “Satisfaction Survey”; or just assumed that what was good for them would be good for customers).

The logic is impeccable. A great deal of time and effort is spent dealing with customer contacts that are unstructured and nebulous. These contacts meander around an organisation, lighting on departments almost at random: they create unnecessary workload; and unless the customer strikes it lucky, they will be fairly frustrated, as someone from the wrong department tries to handle their problem.

So. Formalise a front end process. Carry out research to understand the major lines of inquiry likely. Produce the equivalent of call centre FAQs to help call handlers deal with them. And then....this is where the difficulty arises.

If you allow individuals to escape from that environment, then it is very likely that call handlers will pass on anything difficult, anything that does not quite match their strict guidelines very early in the evolution of the call. The project will fail, as it becomes a nice idea, without the rigour for successful implementation.

Unfortunately, the solution to this risk is often to go to the opposite extreme: to make it nigh on impossible for a call to escape from the call centre and to be dealt with elsewhere. This is probably fine much of the time: but for a fairly small proportion of more serious issues, is absolutely the wrong way to go. The phrase “there is no point talking to anyone else as they will only give you the same answer” is possibly accurate: but it is guaranteed to raise the hackles of even the most mild-mannered caller.

It also means that whilst organisations are now fielding, say, 95% of calls quickly, efficiently and with far less fuss than before, the process they have put in place is almost guaranteed to transform the remaining 5% from minor irritant, to major slanging match – and much more likely for those issues to result in court action.

Yet, so little difference is needed: all that organisations need to do is put in place sensible and monitored exception mechanisms. Define those occasions when a call MAY be escalated – and keep an eye on call handlers to make sure that individuals are not abusing this facility.

Simple. Yet strangely enough, beyond the wit of most major organisations in the UK.

John Ozimek

Senior SCS Consultant

Lack of ability to move outside the envelope.

Protection of core business

Rigid process