ONLINE REFERENCE TOOL NAVIGATION PROCESS IMPROVEMENTS

DEFINE

Problem:

- The Online Reference Tool Navigation process takes 57 seconds (6 clicks) to complete.

- Each additional click that Contact Center associates must perform to find procedural content on the Online Reference Tool takes an additional 5 seconds of call/e-mail handle time.

Goal:

- Develop improvements to Online Reference Tool that would improve navigation that will reduce the average process time by 50% (and # of clicks to three)

Defects:

- This inability to readily access much needed information results in the following defects:
    - Decreased productivity due to increased call/e-mail handle time/number of web site clicks.
    - Inaccurate communication to customers.
    - Rework from customer callbacks.
    - Increased escalations to group leads and team managers.
    - Decreased reliability on and use of online reference tools.

DEFINE (CONTINUED)

Scope

- **Inclusions:**

    - Determine the primary function of the Online Reference Tool communication channel

    - Avoid variation of topics layouts for each interest group

    - Consolidate customers' needs into one common, universal method for locating procedural content that is…

        - Based on a logical process flow for determining the nature of an incoming call or e-mail message

        - Easier to maintain and manage

- **Exclusions:**

    - Search engine options

    - Revisions to department policies and procedures

    - Longer term programming changes

    - Major business initiative impacts

    - Distressed customer escalations

Suppliers

- Voices of the Customer:

    - Customer service associates with job tenure of 6 to 18 months (phone and e-mail channels).

    - Team managers/group leads

    - Quality Assurance associates

    - Trainers

- Online Reference Tool usage survey to gauge associate behaviors with accessing the site
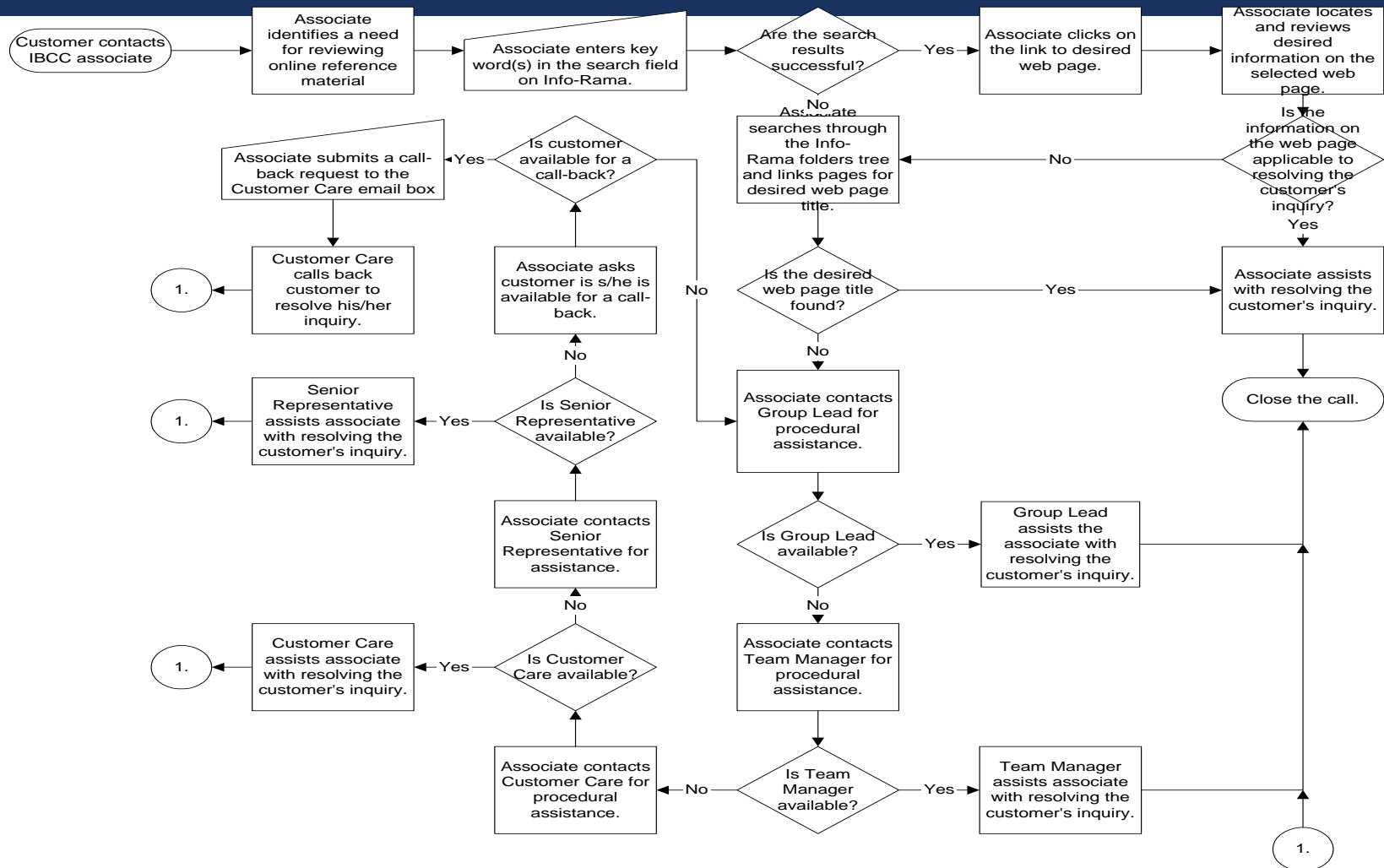
- Associate navigation tests

- Online Reference Tool hit reports

- Quality scores

MEASURE

1. Distribute and conduct survey with all sites.

2. Compile survey results by site.

3. Obtain Quality scores of top 20 and bottom 20 associates.

4. Develop, distribute and conduct navigational tests with Quality score associates.

5. Compile navigation test results.

6. Determine changes needed from survey and tests.

7. Recommend and implement short-term solutions.

8. Test solutions with Quality score associates for signs of improvement.

ONLINE REFERENCE TOOL NAVIGATION PROCESS - PHONE

Customer contacts IBCC associate

Associate identifies a need for reviewing online reference material

Associate enters key word(s) in the search field on Info-Rama.

Are the search results successful?

Yes → Associate clicks on the link to desired web page.

Associate locates and reviews desired information on the selected web page.

No → Associate searches through the Info-Rama folders tree and links pages for desired web page title.

Is the information on the web page applicable to resolving the customer's inquiry?

No → (back to searches through Info-Rama folders)

Yes → Associate assists with resolving the customer's inquiry.

Associate submits a call-back request to the Customer Care email box

Yes ← Is customer available for a call-back?

Customer Care calls back customer to resolve his/her inquiry.

1.

Is the desired web page title found?

Yes → Associate assists with resolving the customer's inquiry.

No → Associate asks customer is s/he is available for a call-back.

No

Close the call.

Senior Representative assists associate with resolving the customer's inquiry.

1.

Yes ← Is Senior Representative available?

No → Associate contacts Group Lead for procedural assistance.

Associate contacts Senior Representative for assistance.

Is Group Lead available?

Yes → Group Lead assists the associate with resolving the customer's inquiry.

No

Customer Care assists associate with resolving the customer's inquiry.

1.

Yes ← Is Customer Care available?

No → Associate contacts Team Manager for procedural assistance.

Associate contacts Customer Care for procedural assistance.

No ← Is Team Manager available?

Yes → Team Manager assists associate with resolving the customer's inquiry.

1.

ONLINE REFERENCE TOOL NAVIGATION PROCESS - E-MAIL

Customer submits an e-mail message to the IBCC.

Associate retrieves message and identifies a need for reviewing online reference material

Associate enters key word(s) in the search field on Info-Rama.

Are the search results successful?

Yes → Associate clicks on the link to desired web page.

Associate locates and reviews desired information on the selected web page.

No ↓

Associate searches through the Info-Rama folders tree and links pages for desired web page title.

Is the information on the web page applicable to resolving the customer's inquiry?

← No

Yes ↓

Is the desired web page title found?

Yes → Associate responds to the customer's inquiry.

No ↓

Associate assigns customer's message to "My Queue" on JIBA and sets it for escalation by a Group Lead or Team Manager

Close the e-mail.

Group Lead or Team Manager retrieves and reviews the escalated message.

Group Lead or Team Manager researches the customer's inquiry.

Associate retrieves and reviews the Group Lead's or Team Manager's remarks.

Yes ↑

Group Lead or Team Manager makes notes about the resolution of the customer's inquiry in JIBA Case Details.

Group Lead or Team Manager reassigns the case back to the originating associate's queue.

Is the Group Lead's or Team Manager's answer in the associate's queue?

No

FMEA RESULTS

#	Process Function (Step)	Potential Failure Modes (process defects)	Potential Failure Effects (Y's)	S E V	C l a s s	Potential Causes of Failure (X's)	O C C	Current Process Controls	D E T	R P N	Recommend Actions	Responsible Person & Target Date	Taken Actions	S E V	O C C	D E T	R P N
1	Identify need	misunderstand need	provide wrong info	4		Associate did not listen	3		4	48							
		misunderstand need	provide wrong info	4		Poor customer communication	3		4	48							
		misunderstand need	customer does not get correct answer	4		listening skills	3		4	48							
		incorrect probing	wrong information	4		associate apathy	4		4	64							
		impromper assumption	wrong information	4		incorrect probing or listening	4		5	80							
		misrouted call	associate apathy	3		lack of mgr availabilty	5		1	15							
		auto escalation	increased rework	2		60 second hold time	3		2	12							
2	Perform search	mispelled word	no result set	2		poor grammar	3		5	30							
		don't search/give up	increased rework	5		apathy	5		3	75							
		search in wrong place	increased rework	2		lack of training verbiage	5		5	50							
		wrong key word	increased rework	2		overreliance on key words	4		4	32							
		overreliance on search	increased rework	4		confusion with location and titles of contents	5		5	100							
		2of 3 searches fail	increased rework	4		verity does not work tricky	5		5	100							
		site not available	no reference info available at all	5		web server down	1		5	25							

3	Review content	inability to find information	delayed handling and unnecessary escalation	5		tmi	5		2	50						
		obsolete information	customer callback, dissatisfaction and escalation	4		confusion	5		1	20						
		wrong informaton/no information	delayed handling. customer callback, dissatisfaction and escalation	4		incomplete information	3		3	36						
		decreased confidence	stop using website. Unnecessary escalation.	3		obsolete or incomplete information	5		2	30						
		increased co-dependece on lead authority	stop using website. Unnecessary escalation.	3		inconsistent information	4		2	24						
		don't review content	inconsistent, obsolete or wrong information. Unnecessary rework and escalation from customer	5		apathy or decreased confidence on validity or location of information	4		3	60						
		broken links	delayed handling, decreased confidence, unnecessary escalation	4		moving pages	3		2	24						
		can't make decision	delayed handling, unnecessary escalation	3		not enough time	3		4	36						
		refer to lead	delayed handling, unnecessary escalation, inconsistent information	2		insufficient delegated authority	4		2	16						
		can't find resolution	delayed handling, unnecessary escalation	4		don't understand	5		2	40						

4	Determine resolution	auto escalation	delayed handling	3		overreliance on team lead/doc. Directs them to lead	3		1	9				
		no authority	trf to customer care	2		limited auth	3		1	6				
5	Clarify with lead	cannot/do not claify with lead	delayed handling, possible callback	5		conflicting info tension	3		4	60				
		incorrect current info	possible callback, unnecessary escalation	4		lead not available	2		4	32				
		incorrect lead info	possible callback, unnecessary escalation	4		too many meetings	2		4	32				
		customer can't wait	possible callback, unnecessary rework	4		obsolete information	3		1	12				
6	Respond to customer	incorrect response	possible callback, unnecessary escalation	4		incorrect assumption	4		5	80				
7		incomplete response	possible callback, unnecessary escalation	4		doc calls for escalation	4		5	80				
8		die on the vine	rework	5		conflicting information	2		4	40				
9		hang up onn customer	possible callback, unnecessary escalation	5		not familiar with process	1		3	15				

NAVIGATION TEST

- Comprised focus groups of e-mail and phone associates at Irving Contact Center who had the highest and lowest average Quality score for two consecutive months.

- Conducted one trial of navigational tests with the focus groups.

- Test consisted of 10 most frequently asked questions that associates escalate to lead authorities because they cannot find or do not know the answer. Questions were compiled from lead authorities who participate in the Online Reference Tool Navigation Process Improvement work group.

- Objectives of test:

  - Confirm the current process map flow.

  - Measure the number of clicks performed by each associate to reach a desired web page on Online Reference Tool.

  - Identify defects observed during the test, such as:

    - Broken links

    - Misunderstood/obscure/vague link titles

MEASUREMENT SYSTEMS ANALYSIS: ATTRIBUTE GAGE R&R STUDY
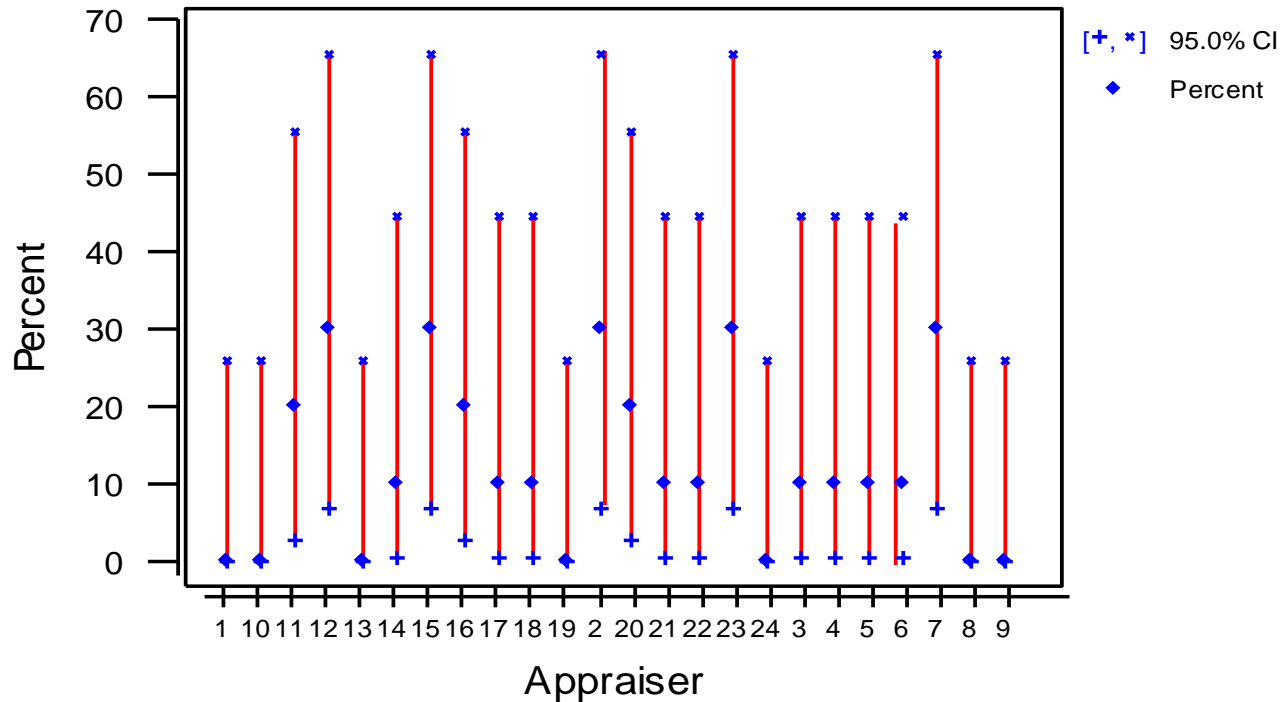
MEASUREMENT SYSTEMS ANALYSIS:
BOX PLOT/AVERAGE NUMBER OF CLICKS
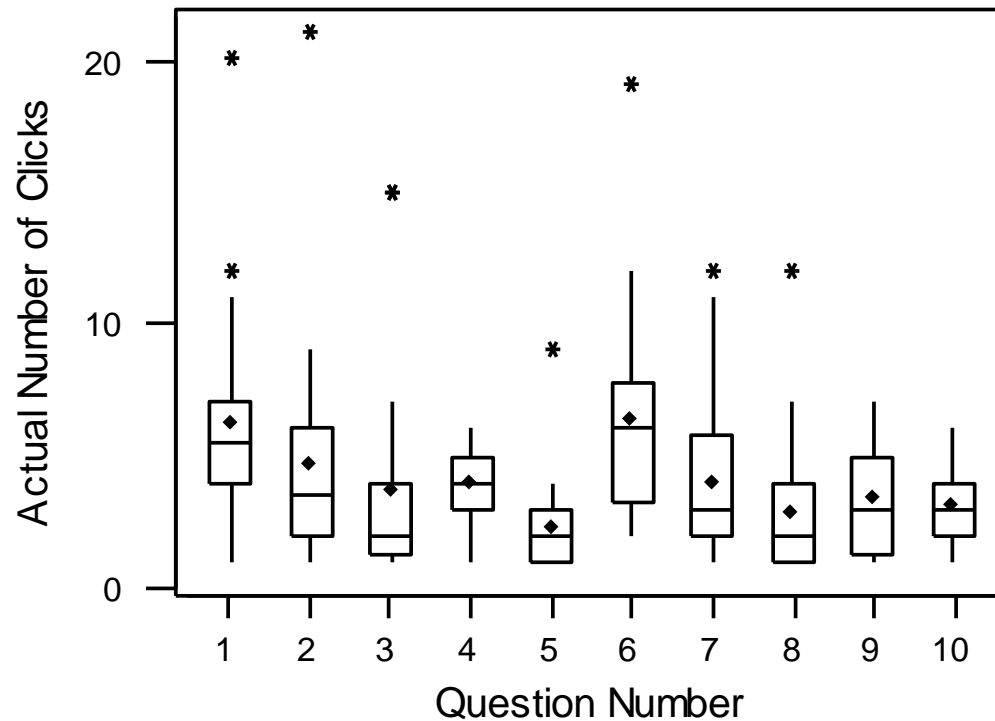
NAVIGATION TEST TRENDS

- Confusion with Compliance Folder

  - Looking for Company's Privacy policy in Associate Communications folder.

  - Some associates may be identifying the name of the folder with the old term used for adherence to service level.

- E-Mail agents' test results varied from phone agents' test results because e-mail associates claimed they do not perform some of the procedures in question.

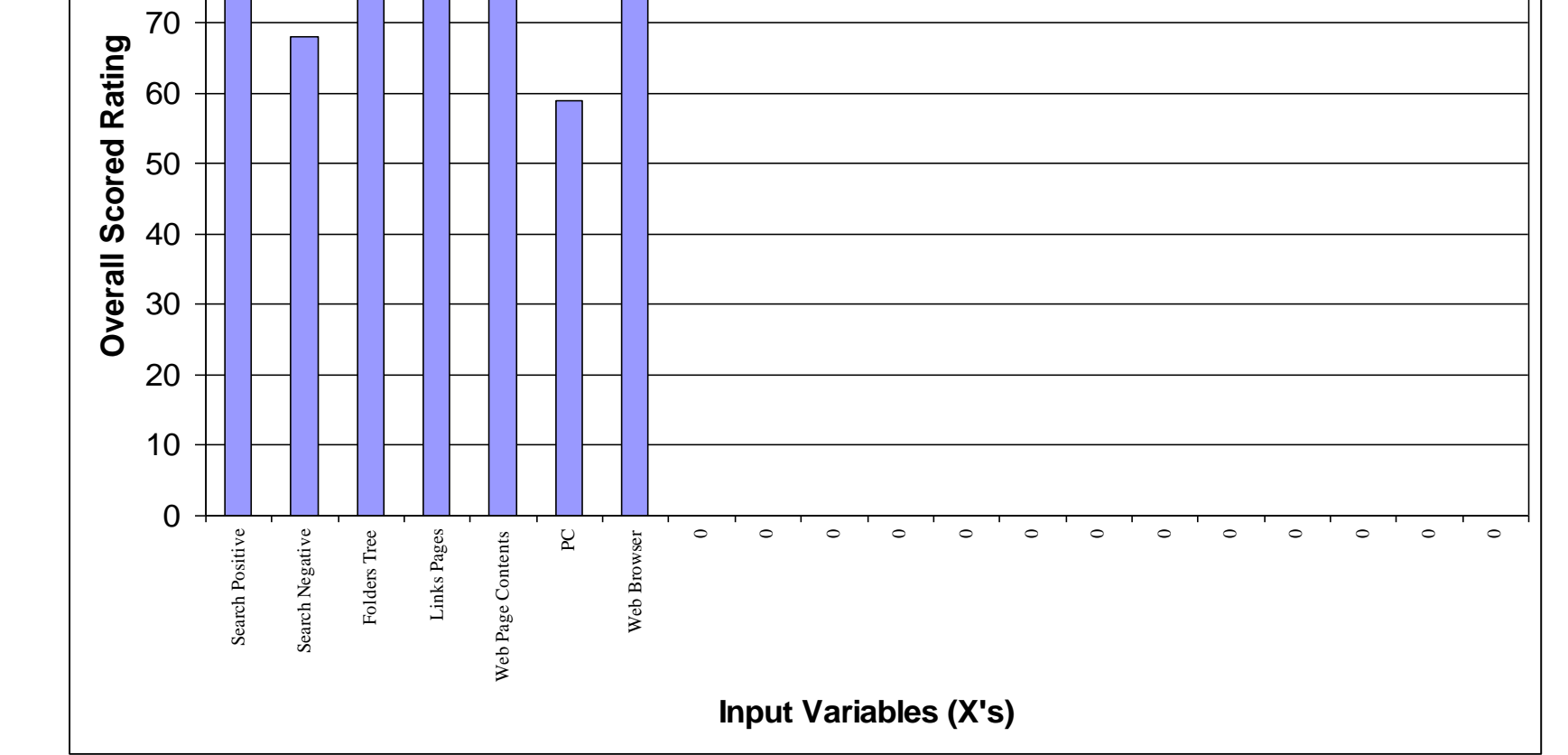- The search processes observed during the test match those defined in Process Map.

CAUSE AND EFFECTS

Training

Inadequate Instruction

Lack of Demonstration

Technical verbiage

Tree navigation

Problems with concurrent use of browsers

Technical verbiage

Layout and Design of Content

Unclear Titles

Illogical locations

Environment

Not organized in a clear, concise manner

Illogical locations

Confusion between folders tree and drop-down menu

Layout and Design of website

Visuals

Customer Care Gate is closed

Obsolete info.

Broken links

Inability to readily access online documents

Inadequate Navigation Instructions

Associates restricted to customer hold time of 60 seconds

Inability to multi-task

Search results unclear

Over-reliance of Search feature

Misspelling or typo

Search field in wrong place

Procedures

Inadequate Management Support

Agent review process depends on cycle time.

Inability to multi-task

People

Associate Apathy

Misspelling or typo

CAUSE AND EFFECT MATRIX

Input Variables (X's)	Output Variables (Y's) / Output Ranking	Training	Technical Support/Product Features	Online Instructions	News Stories	Direct Marketing/Cust. Letters	Compliance Policies					
		5	5	3	1	4	3					
Search Positive		5	3	3	1	5	2					76
Search Negative		4	3	2	1	5	2					68
Folders Tree		3	5	5	1	5	2					82
Links Pages		5	4	3	1	3	4					79
Web Page Contents		5	5	4	3	2	2					79
PC		3	4	3	1	2	2					59
Web Browser		5	5	3	2	2	3					78

Cause and Effect Matrix Output

A bar chart titled "Cause and Effect Matrix Output" showing Overall Scored Rating (y-axis, 0 to 90) versus Input Variables (X's) (x-axis). Bars: Search Positive ≈76, Search Negative ≈68, Folders Tree ≈82, Links Pages ≈79, Web Page Contents ≈79, PC ≈59, Web Browser ≈78. Remaining categories are labeled 0.

Quality Function Deployment Matrix

CTQ's	Importance	Number of Clicks	First Contact Resolution (CAT Score)	Number of Escalations (Sampling)			Total
Optimal Training	4	5	4	2			160
Accurate, complete and consistent information	5	1	5	3			75
Optimal time required for search	4	5	1	4			80
Easy access to job reference tools	4	5	1	1			20
Confidence of information contents	5	5	0	4			100
Reliance on self-service	5	5	5	4			500
Solutions oriented	5	4	5	2			200
							0
		Total	Total	Total	Total	Total	Total
		30	21	20	0	0	0

- There is a strong relationship of number of clicks and handle time involved to CTQs, specifically reliance on self-service.

- If we decrease the number of clicks and time handle time, then we will improve first contact resolution.

ANALYZE - ROOT CAUSE STATEMENT

Root Cause Analysis and Improvement Plan developed at Kaizen Blitz event with the Online Reference Tool Task Force

Ishakawa --Predominant Causes
(Processed through the Five Why's Tool)

- Not organized in a clear/concise manner -- illogical location and unclear titles

    - Differences in audience skill sets and knowledge levels with regard to subject matter.

    - Confusion with when to use folders tree versus drop-down menu.

    - Dynamics of change has negatively impacted pace of adequate content management and review.

- Over-reliance of Search function

    - Search function was not originally intended to be the primary navigation tool.

- Associate apathy

    - Easier access to escalate to lead authorities (Hidden Factory)

Root Cause Statement

- Problem:

    - The Online Reference Tool Navigation process takes 57 seconds (6 clicks) to complete. to improve this tool to enable associates to more readily access content in order to service our customers requests

- Root Cause:

    - Associates are unable to readily access content on Online Reference Tool due to rushed changes, inadequate piloting/testing, variable audience skill sets/knowledge levels, information overload and ineffective online reference reinforcement by requested authorities.

KAIZEN BLITZ FOCUS

- Determine the primary function of the Online Reference Tool communication channel.

- Avoid variation of topics layouts for each interest group.

- Consolidate customers' needs into one common, universal method for locating procedural content that is…

  - Based on a logical process flow for determining the nature of an incoming call or e-mail message.

  - Easier to maintain and manage.

PRELIMINARY IMPROVEMENT OPPORTUNITIES

- Remove options from drop-down menu that are also located within folders tree.

- Update most frequently viewed pages links based on more recent Web Trends report results.

- Remove Search field from top of folders tree and retain it in drop-down links menu.

- Replace Search field from top of folders tree with link to most frequently viewed pages.

- Remove contents from the web site that are not procedural in nature. Migrate associate-focused and site-specific communications to the Customer Service and Support web site for delivery channel consistency.

APPROACH

- Analyze phase:

  - Compile and assess associate navigation preferences (upper and lower specifications) from user experience surveys.

- Improve phase:

  - Use Lean tools to sort, store and standardize procedural content for easier recognition and quicker access.

  - Use QFD tools to determine:

    - Internal customer needs

    - Functional requirements

    - Product design specifications

    - Process design specifications

  - Pilot revised layout of folders tree and renamed links with focus group.

  - Re-measure focus group after improvements have been made to detect gains in navigational efficiency, improvements to quality scores and reduction in average handle time.

- Control phase:

  - Revamp, Retrain, Reinforce

  - Use Web Trends reports to proactively detect changes in content retrieval needs.

TOOLS

- Use Lean Enterprise tools to sort, store and standardize procedural content for easier recognition and quicker access.

  - Separate needed from unneeded.

  - A place for everything and everything in its place.

  - Establish standards for content organization and maintenance.

  - Identify methods to sustain the organization and currency of content.

SEPARATE THE NEEDED FROM UNNEEDED

- Focus only on organization of contents regarding "My Customers and How to Service Them".

- Migrate associate-focused and site-specific content to an Contact Center tab on the Customer Service and Support web site for delivery channel consistency.

A PLACE FOR EVERYTHING AND EVERYTHING IN ITS PLACE

- Organize access to content by selecting from each of the following central buckets.
  1. Specific State/Market
  2. Associated Product
  3. Associated General Topics Category, such as:
     - Browser Issues
     - Features and Pricing
     - How To/How Do I?
     - Marketing Promotions
     - Risk Management
     - Technical/System (including System Alerts)
     - Verification Procedure
     - Walk-Through

A PLACE FOR EVERYTHING AND EVERYTHING IN ITS PLACE (CONTINUED)

- Create an Appendix drop-down menu that provides access to the following ancillary topics:
  - Desktop systems navigation Glossary
  - "My Division"
  - "My Company"
  - Operating systems navigation
  - Phone numbers
  - Specified Search
  - Take a Quiz
  - Take a Survey
  - Managers/Customer Care

ESTABLISH STANDARDS FOR CONTENT ORGANIZATION AND MAINTENANCE

- Integrate web content design and terminology with standardized style guidelines.

- Migrate phone numbers list, glossary and product features/pricing respectively to company-wide databases.

- Change frequency for running broken links report from a monthly to a weekly basis.

IDENTIFY METHODS TO SUSTAIN THE ORGANIZATION AND CURRENCY OF CONTENT

- Coordinate initial review and inventory of content with core team leads from each site to be completed in 30 days.

  - Review existing procedures that pertain to their specific group.

  - Indicate which documents are obsolete.

  - Indicate where revisions are needed.

- Hold monthly user review group meetings with content experts to ensure consistency, accuracy and currency of procedural documentation.

  - Institute a policy that any requests to change procedure content will require mutual consent and sign-off by site executives or their designees before modifications are made to the web site.

- Hold quarterly curriculum reviews with Training to ensure consistency, accuracy and currency of procedural documentation.

THE CONTROL PLAN

- Administer periodic associate feedback surveys to ensure we continue to capture the Voice of the Customer.

- Provide associates with direct feedback via the Write Us channel on Online Reference Tool.

- Partner with Training to develop an ongoing training module on how to use the Online Reference Tool features.

- Develop standards for content providers to more accurately maintain information in the appropriate locations to ensure "a place for everything and everything in its place."

- Provide managers with access to Online Reference Tool Hit Reports to encourage associate use and adoption, thus enforcing management and associate accountability.

IMPROVEMENT ACTIVITIES

- Developed and documented new navigation layout

- Inventoried existing contents for currency and assign them to navigation buckets

- Provided navigation bucket assignment instructions to programmer for file maintenance of documents

- Designed new navigation layout and back-end folders on test site

- Edited contents of documents requiring updating

- Reviewed test site and layout with online reference tool process design team for concurrence

- Piloted test site with focus group. Obtain feedback as necessary for modifications

- Re-administered same navigation test to focus group as was used in Measurement phase to ensure process improvements. Had two proctors co-verify results to ensure accuracy

- Held team meetings to communicate new online reference tool navigation layout

- Launched new navigation layout on production web site to general user population

- Instituted control tools to ensure continuous navigation process improvements

IMPROVEMENT RESULTS

- The Online Reference Tool navigation process originally took 57 seconds (6 clicks) to complete. The objective of the project was to improve this tool to enable associates to more readily access content in order to service customers' requests. The project netted a more user-friendly tool with a processing time savings of 30 seconds per each Online Reference Tool usage with annual cost savings of $65,584.

  - Before process   =   57 seconds (6 clicks)
  - After process: =   27 seconds (3 clicks)
  - Process time savings   =   30 seconds saved (52%)

FINANCIAL CALCULATION OF IMPROVEMENT RESULTS

	Savings Type:		Time		Project "Y"	AHT, ATT, Shrinkage, etc.											
	# Defects in One Center (Per Day)		Time per Defect (seconds)		Total Defect Time (Seconds)	Total Defect Time (Hours)	Equvilent FTE Days Lost (Per Day)	Avg. Annual Variable Expense per Agent		Annual $ Cost of Defect (COPQ)							
Personnel	1,763	X	30	=	52,890	= 14.692	=	IBCC									
							1.836	$ 35,712			Years				Complex Formula		
					(60 X 60)	8.000				$ 65,584	X	1	=	$ 65,584	+	$ -	=	$ 65,584
	Enter Values in Green boxes				Seconds in an Hour	Phone Hours per FTE per day				Cost Reduction (12 Months)				Cost Reduction (1 Years)		Cost Growth Avoidance (1 Years)	Total Benefit (1 Years)