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A callback metric might help uncover customers' unresolved issues

Simply asking, "Have I resolved all of your issues?" won't always get reps to the customers' unspoken and unresolved issues. But using a repeat call metric can help to identify those issues.

The hallmark of companies that use first-call resolution as a performance metric has come to be the question that agents often ask at the conclusion of customer service phone calls: "Have I fully resolved your issue today?" And if the customer's answer is "yes," then that customer interaction can be chalked up as having been resolved in one call.

But according to Rick Delisi, senior director of advisory services for the Corporate Executive Board Company (CEB) and one of the co-authors of *The Effortless Experience: Conquering the New Battleground for Customer Loyalty*, that question is probably one of the worst ones that customer service reps can ask.

Finding the unspoken issues

The question — "Have I fully resolved your issue today?" — says Delisi, is really just code for "Can we close this call right now in a way that keeps my average handle time within reason and also gives me credit for achieving first call resolution?"

But the reality is that customers don't really know if their issue has been resolved or if there will be related adjacent or downstream issues that may arise after the call that will require them to call again. "So most customers who say, 'Yes, you have fully resolved my issue,'" Delisi says, "are really just saying, 'I guess so. As far as I can tell, you've resolved my issue.'"

Delisi adds: "But customers, as we say, don't know what they don't know. And what they don't know is either, 'Is there some related issue that I will only become aware of at some future time — when I get my bill, for instance — which will prompt me to call you again?' Or, 'Will I be fully confident five minutes from now, or five hours from now, that the issue is completely resolved?' And that's why we have been telling companies that focusing on first contact resolution is a false goal."

There are other types of implicit and adjacent issues — "downstream issues that might at first glance seem unrelated, but are ultimately connected to the

Get reps involved in reviewing customer callbacks

Using customer callbacks as a metric makes sense only if you are ready to invest the time in reviewing those calls to determine what reps might have done or said on the first call to minimize the need for a customer to call back. And for this, Rick Delisi, a co-author of *The Effortless Experience*, suggests that managers get their frontline reps involved in that discussion and review process.

"One strategy that we have learned in working with clients," Delisi says, "is to ask each rep to start to take notes when they find they are talking to a customer who has called previously about the same issue. In addition to trying to help them at that moment, the rep should also be asking himself, 'What could the last rep have done differently that would have eliminated the need for the customer to make this call right now?' And the point is not to cast blame, but to identify those issues that need to be addressed on the first call to eliminate the need for the subsequent call."

Delisi adds: "Once you begin to awaken reps to the impact of downstream repeat calls, they begin to pick up on it themselves and make suggestions for the good of entire enterprise — by identifying what it is that we are doing, even inadvertently or unconsciously, that is creating unnecessary additional callbacks."





first thing the customer called about,” Delisi says. And there are also emotional triggers that can cause a customer to second-guess the information that they were given or double-check to see if another answer exists to their question. Customers can also call again if they decide ultimately that they just didn’t like the original answer or resolution they were offered.

As a result, what customer service organizations should be tracking and concentrating on, instead of first-call resolution, is what Delisi calls “next issue avoidance” or NIA.

FCR versus NIA

“We think of this idea of NIA as like the 2.0 version of first-call resolution,” Delisi says. “Clients will sometimes ask, ‘If you bring up some potential related issue on a call, aren’t you just making that call longer?’ And we would say, no, by identifying and dealing with those issues ahead of time, you are reducing not average handle time, but total handle time.”

He explains: “If we turn a three minute-call into a four-minute call by dealing with a potential downstream issue, that might seem to be inefficient, but if that extra minute on the first call prevents yet another three-minute call, then that is a total handle time of four minutes instead of six minutes. It also makes it easier on the customer.”

The new metric that Delisi and his co-authors would have companies adopt is tracking repeat calls from customers as a way of reducing the total number of repeat calls. “And companies that have done this — through both electronic and through some less elaborate manual ways of tracking repeat calls — have found that some of the things that agents do can greatly increase or decrease the number of repeat calls from the same customer about the same issue,” he says.

By tracking repeat calls per customer and repeat calls per agent, Delisi says, companies will discover things that agents are doing or saying that would typically go unnoticed in the QA process. “So in fact, the agent who is great at reducing call backs might actually be showing a higher average handle time,

which might seem to be a negative, but in fact is a huge net positive for the company,” Delisi says.

Setting up a repeat call metric

Creating a repeat call metric for your service center is relatively straightforward. The first step is to determine the threshold of the number of days during which it makes sense to track repeat calls. “And we have seen companies use a threshold of as few as three days or as long a threshold as 30 days, but seven days seems to be the most common,” says Delisi. “And there are probably a number of business and industry considerations that would go into determining the threshold of callbacks — but the key is simply to pick one that makes sense and that you can use as a standard of comparison over time.”

But Delisi also warns that unless you are recording all customer calls and can access those recordings for review, you don’t want the threshold to be so long that your customer service reps can’t remember any of the details of the calls.

As for the methods that companies can use to track repeat calls — “if customers have to key in an account number, then that would tell you right away how often that account has called in,” says Delisi. “Or you can use trunk data — how often has this phone number called in. And another simple approach is just to ask people — i.e., ‘Is this the first time you have had to call about this issue?’ That might sound simplistic, but there are a lot of companies that do it and it yields some great information.”

By tracking this data and benchmarking reps against each other in terms of repeat calls, “you will begin to see what some reps are doing differently that might be causing more or fewer callbacks,” Delisi says.

“And every company that we have talked to that has done that has said that within the span of a couple of months, they have seen some clear trends emerge that were relatively easy for them to fix — but they were things that they never would have seen if they hadn’t started tracking callbacks.”

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