

## **Customer First**

### **“Nobody’s Calling Back!”**

By Ernie Arboles

#### **Overview**

It’s not uncommon for high-tech firms to have a lock on the technologies that enable them to accelerate the velocity of business. However, these same companies often find themselves seriously deficient in handling transactional items and service. The growth rate in the upward arch of their technological advancement often leaves basic transaction and delivery systems lacking. This is especially true from the customer’s perspective. The most basic of customer satisfiers, such as on-time delivery, prompt call center call backs, accurate and timely invoicing and cash collection become the critical points for process improvement.

#### **The Problem/Opportunity**

One client had a particular problem with funneling leads from its call center to its sales staff. Many leads ended up lost or forgotten. This created tremendous customer dissatisfaction, significant revenue loss losses, and plenty of internal finger pointing.

#### **The Goal**

The client needed to reduce cycle time and the “fallout” of leads between the call center and the sales force. The company needed to recapture revenue and customer loyalty as well as regain a peaceful work environment.

## **The Work**

Because the scope of the work involved more than one functional area, the team had to spend some time collaborating around the process involved in the sales lead handoff. Also, there would be the potential for some substantial changes in the process, prompting the team to start laying a foundation for change management. We polished off the right tools from our Customer First toolkit and got to work.

Next came the quest for data. The team had a pretty good idea of the high-level problem, but understanding the causal factors behind the delays would require some good information on the numbers of calls being received, the time those calls came in, when and how they got handed off, and when the return call to the customer was finally made.

## **The Analysis**

Two things became strikingly clear. First, an arcane and convoluted system routed leads to account managers based on types of business, geography, and the potential dollar volume of the deal. Second, the team discovered a mismatch between sales policies and the behaviors of sales people. In some cases a sales call to the center would not be returned by a sales person until six or seven business days had passed. Nearly half of these late calls resulted in the customer contacting competitors.

## **The Improvement**

The team brainstormed potential solutions around the three key problem areas: routing of leads, the business rules behind those routings, and the behavioral of account managers.

Looking at the routing of leads through some simplified process maps and a “value-add” exercise quickly revealed where the leads stalled. A streamlining of that process lead to a dramatic reduction in wait time.

Next, a review revealed a Byzantine collection of rules that had been amassed over years of “kludged” business practices. An analysis of the rules revealed they could be boiled down to about seven key items. Once streamlined, the cycle time took another drop.

Finally, some key interviews and analysis with the account managers revealed that they simply never got around to completing some important tasks. Account managers would fail to update their profiles, leading to slow, misrouting of key information. The team therefore set a goal of engaging sales management to reinforce the policies. They also lead a series of mini-training sessions to make sure sales teams had been properly instructed on how to handle their profiles, and leads.

## **The Payoff**

A more than 50% reduction of cycle time paid off handsomely with a recapturing of hundreds of leads each month. Once the team attached a basic “value” of about \$3,500 per lead, the math--and the benefit--became clear. Plus the improvement also lead to sales staffers being much happier about getting the right lead for them at the right time.

## **Your Opportunity**

Creating a good customer-centered process is key to gaining market share and growing your business. In a sophisticated business with many moving parts, the right solution is not always clear. Often, the solution you create is treating a symptom, but not the root cause. A carefully executed Customer First plan can help you zero in on those things impacting your customers’ experience.

Call today for a free consultation on our Customer First program. Our experience and expertise can deliver a tailor-made program for your success.

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Case notes: The cases are presented as illustrative examples. The names of the companies involved and any identifying details are omitted to protect the confidentiality of our client relationship.