

# How To Conduct A Support Center Evaluation

Be a proactive force in the continuous improvement of your service, your customers' satisfaction, and the overall success of the entire organization.



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## Conducting A Support Center Evaluation

In the world of Support Services there is no standing still. Either you are moving forward—aggressively involved in continual improvement, or you are focused on survival—and at risk of failing. As our industry increases in size and complexity, if you are not moving ahead then you are falling behind. Your customers, your goals and your tools are in constant state of change and increasing expectations. Your support organization must embrace a commitment to continually improve itself and its services in order to be successful. Where do you begin?

### ***Conditions for Success***

A successful assessment will identify those areas in which your support center is performing strongly, highlight areas of weakness, and help you identify significant risks and potential opportunities. But what makes the effort a success? Why do some organizations realize measurable benefits from such an effort, where others do not? How can you maximize the benefit from your evaluation effort?

Perhaps the best way to ensure success is to manage the entire assessment as a formal project, using established project management methods and standards. But there are several other factors that experience indicates are of major importance in completing your evaluation successfully and realizing the full benefit of having done so. Before you begin, review the Five Basic Requirements listed below. If one or more of these conditions are not satisfied in your own environment, you may wish to spend some time addressing that issue before attempting the evaluation.

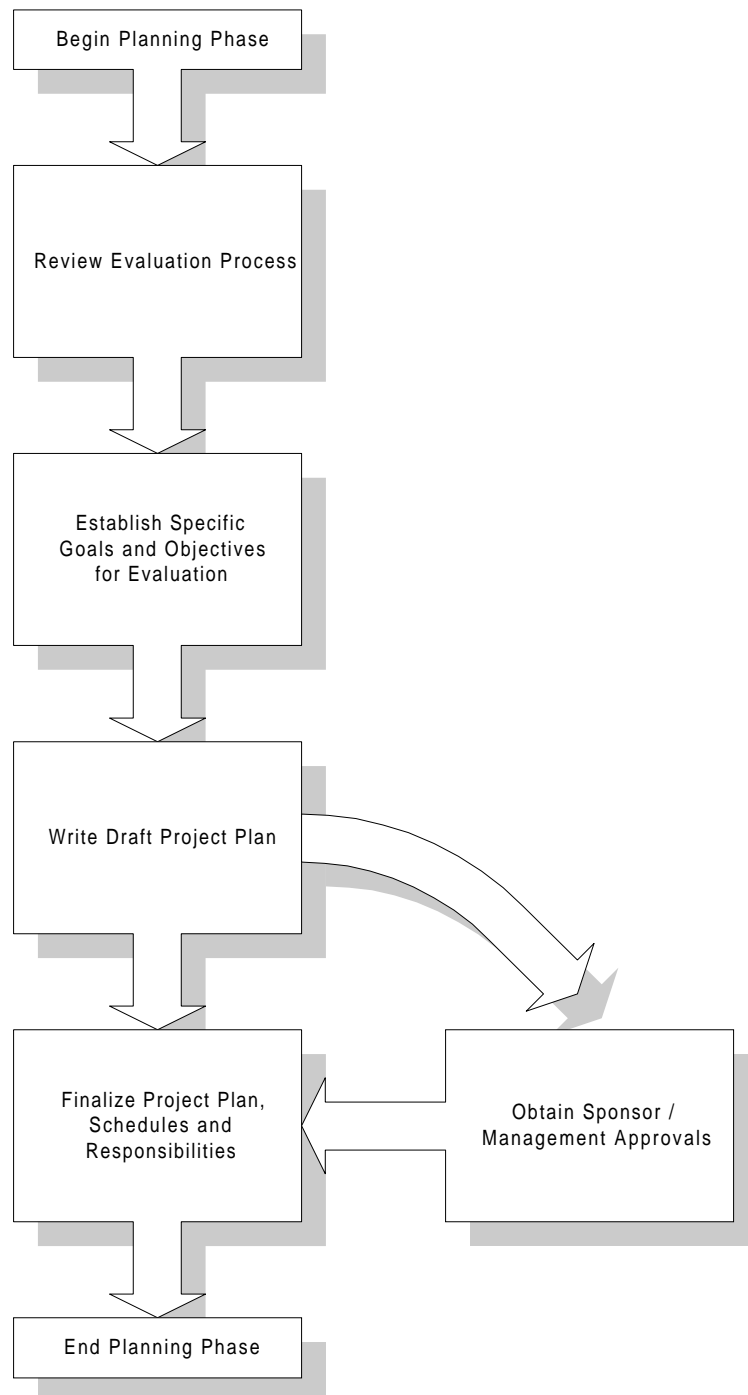
### Basic Requirements for Success

- A general environment of trust, teamwork and mutual respect
- Senior management understanding of and support for the assessment process
- Sufficient time and/or resources to complete the evaluation in a timely manner.
- Management commitment to take action based upon the results
- Adequate resources to implement the changes and enhancements suggested by the evaluation

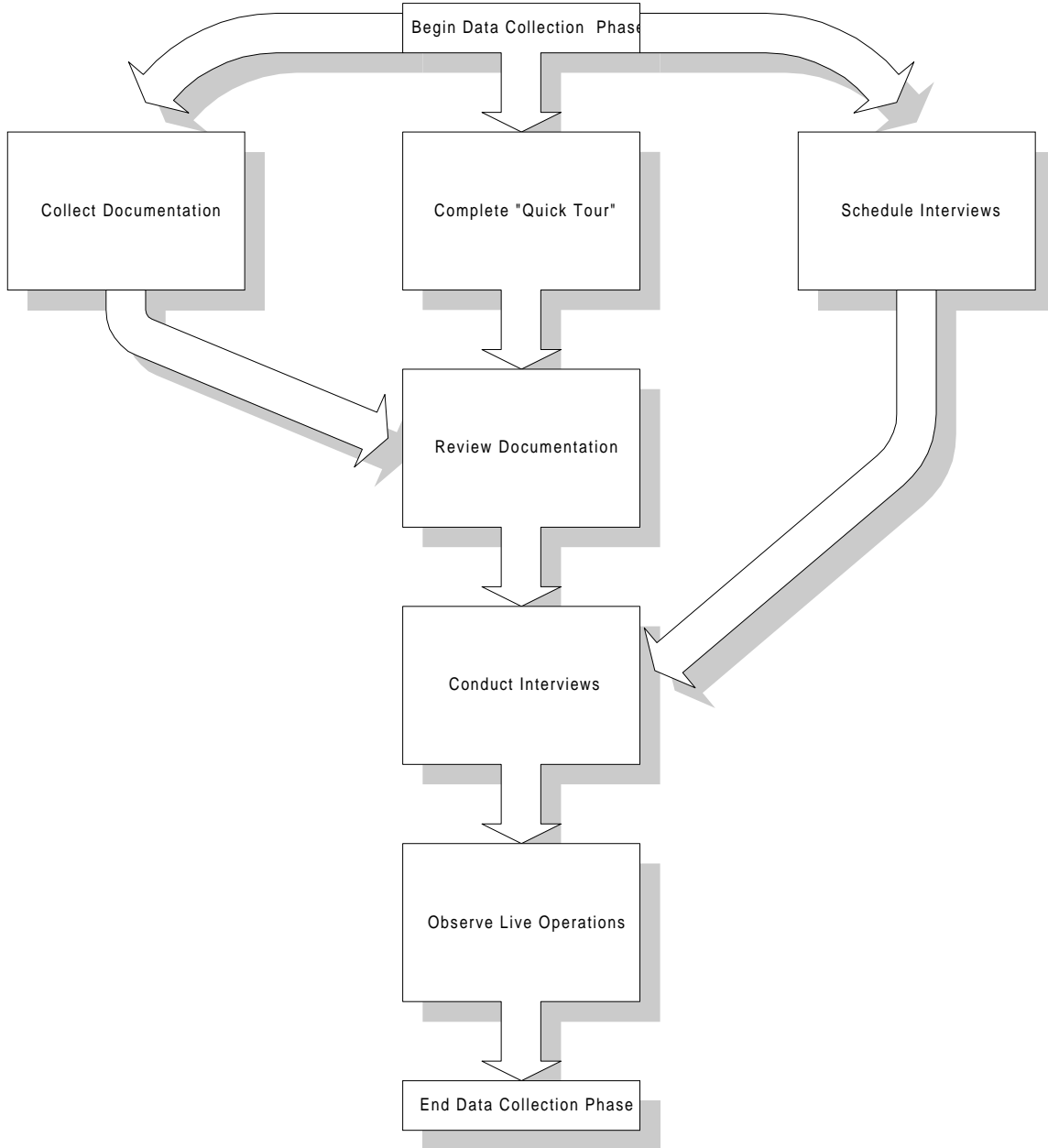
## ***Assessment Process Flows***

The flow diagrams that follow depict the entire assessment process. Each of the major process steps is illustrated in the order in which it should be completed as you implement your evaluation. The flow diagrams provide an overview of the entire process, showing how the various activities fit together and serving as a starting point for your project planning. For each process step depicted in the flow diagrams you will also find a detailed description of that step, along with suggestions for implementing it effectively. Use the process flow diagrams to guide your preliminary project planning, to present the process to your sponsors and management, and to chart your progress through the process.

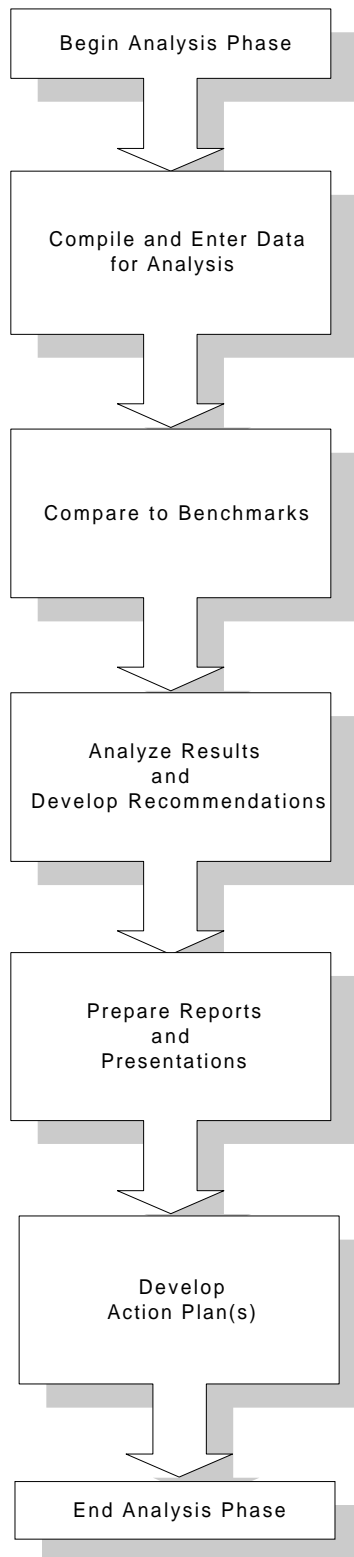
### Support Center Assessment Process: Planning Phase



### Support Center Assessment Process: Data Collection Phase



## **Support Center Assessment Process: Analysis Phase**



## ***Support Center Assessment Process Step Descriptions***

The preceding process flow charts illustrate the assessment process, and show how the various steps relate to one another. In the paragraphs below, you will find more detailed descriptions of each process step included on the flow diagrams. You should review these descriptions carefully before you begin the actual planning and design of your own evaluation.

## **Planning Phase**

You will begin your assessment by establishing your own specific goals and objectives, developing your evaluation project plan, and reviewing it with your management sponsors to ensure their understanding and win their approval to proceed.

### ***Review Evaluation Process***

The first step to successfully conducting your evaluation is to carefully review the process flow charts to achieve an overall understanding of the steps involved. Review the individual process step descriptions carefully, and determine how the general guidelines will apply within your own specific organization and operation. Once you have completed these preliminary steps, you are ready to plan the details of your assessment.

### ***Establish Specific Goals and Objectives for Evaluation***

An evaluation is normally conducted for the purpose of reviewing the Support Center's overall Business Alignment, Service Culture, Operational Processes, Staff Motivation and Skills, and the Tools and Technologies in use. While these are broad categories with general application to every support center operation, the assessment process examines them in considerable detail. The normal objective of such an evaluation is to assess the effectiveness of the Support Center at a high level, to identify current strengths and weaknesses, highlight areas of risk and opportunity, and provide a rough comparison to how existing practices compare to those that can be considered "best practices" in the industry.

It is entirely possible however, that you may have different, or additional objectives. Perhaps you wish to conduct a more thorough and in depth analysis of some particular area or issue. Or you may want to assess the impact of providing new or additional support services from your support center. The assessment process can be readily expanded to assist you with such expanded objectives. Or it can

provide you with the necessary baseline understanding to launch more comprehensive projects or to make more effective use of external vendors or consultants.

Before you begin mapping out the plan for your evaluation, take a few moments now to clearly establish your goals, objectives and expectations. Write them out. Put them aside for a day and review them. Are they still complete? Still accurate? Determine if the standard assessment will adequately address your objectives. Note any additions or extensions you might want to add to the standard process. The extensive data collection activity required for completing your evaluation presents an excellent opportunity to collect the information you may need for related or more detailed work.

### ***Write Draft Project Plan***

You have already been advised of the importance of managing your assessment as a project. With your goals and objectives clearly established, it is time to begin writing your project plan. The level of detail required in your plan will, of course, depend upon the extent and complexity of the evaluation. Your project plan should include at least the following elements:

1. **Management Summary:** This is the place to communicate your goals, objectives and expectations for the evaluation. Keep it short, make liberal use of graphics and bullet items. It may be the only part of the plan that your sponsors and senior management read.
2. **Goals and Objectives:** State the objectives of the project briefly and clearly. This is also a good place to explicitly list any activities or results that are *not* a part of your objectives or intentions for the assessment.
3. **Comprehensive Task List:** This is the core of your project plan. List out, in as much detail as appropriate, each discreet task you must accomplish. For each task, estimate the time required for completion, any other tasks upon which it is dependent, tasks that depend upon its completion, and costs or resources required to complete it, and who you expect to be responsible for getting it done.
4. **Project Schedule:** Using the estimated times prepared in your Task List, establish the Start and Finish dates for each task, and for the project overall.
5. **Project Budget:** Identify the cost of the project, including any specific expenses required to complete each task. Be sure that you will have all the time and resources, financial and

otherwise, that you will need to complete the project. Nothing is more discouraging than to begin, only to find you are unable to complete the work due to time or resource constraints.

6. **Risk Analysis:** The assessment process is not risky. But you should identify any possible risks related to your ability to complete the project (lack of management support, resource issues, travel considerations, etc. ). For each risk that you identify, try to design a contingency plan now, before it has the chance to interrupt the completion of your assessment.
7. **Reporting Procedures:** Establish in advance who needs to be kept informed regarding the project, when, and how. Identify what formal reports will be produced, when they will be issued, and who will receive them.

### ***Obtain Sponsor/Management Approvals***

With your project plan drafted, this is the time to review it with your sponsor or management. Now you can give them the specifics of your plan, and verify that it meets their expectations as well as yours. Solicit feedback, and set the appropriate expectations. Let your own organizational norms drive the form and content of this review, but do not skip it.

### ***Finalize Project Plan, Schedules and Responsibilities***

The final step in your planning is to incorporate any additions, revisions or other changes suggested by the management review into your project plan. The final document will provide a tool for your use in tracking progress and assuring completeness.

## **Data Collection Phase**

In the second phase of your assessment project, you will systematically collect all of the data you will require to complete a thorough evaluation. This will include documentation, interviewing key customer, staff and management personnel, and making direct observations of your Support Center in action. Do not be concerned with drawing conclusions or analyzing the results at this point, but rather concentrate on ensuring that all of the relevant information is collected and recorded. Your final results cannot be any better than the data you use to produce them, so complete this phase of the project with care and attention to detail.

## **Complete “Quick Tour”**

The “Quick Tour” is intended to get your data collection effort underway by taking you on a brief “tour” of your existing operations. You will be taking an overview level look at the entire support center, identifying key data elements, activities, technologies and individuals that you will want to investigate in more depth later. You will quickly determine what information is easily available, what will require some effort to unearth or assemble, and what might simply be unavailable at all. The results of your “Quick Tour” will assist you in assembling a list of documents for review, serve as an aid in refining and customizing your interview sheets, highlight aspects of the operation you will want to learn more about through direct observation, and suggest areas where you may wish to do some additional research.

Do not invest excessive time in completing the tour. One day is normally more than enough time. The purpose of the “Quick Tour” is to simplify your data collection efforts and help make sure they are effective. It is not intended as a replacement for this more in depth research. Also, you should know that it would be very unusual if you could easily obtain *all* of the data you would like to have. Remember, finding out what you do *not* have, or cannot easily obtain, can often be as revealing as what you do have.

When you have completed the “Quick Tour”, record any important data elements, notes or impressions.

## **Collect Documentation**

After completing your “Quick Tour” and recording any important findings, you will need to collect copies of all the important documentation that you need to verify or review. Use your planning notes and the results of your “Quick Tour” to compile a comprehensive list of the specific documents to be reviewed, the source of each document, and, for periodic reports, the time periods you wish to consider. After you have compiled your list, request and obtain current copies of each document listed.

Note that this activity is shown on the Process Flow Diagram as occurring in parallel with the “Quick Tour” and other tasks. Since it may require time to produce reports, locate and reproduce documents, etc., it is to your advantage to identify your requirements and request and locate the documents as soon in the process as possible. Be careful not to rush through the compilation of your list of documents, however. It can be very frustrating to arrive at the Analysis Phase only to find key documents have not been included in your research.

## ***Schedule Interviews***

While on the surface of it, this may seem to be a simple matter, you may find that scheduling time to meet with everyone that you need to interview can consume a very great amount of time. You may have a difficult time scheduling a time for the interview, particularly with senior managers. You may find that some interviewees will want to speak to you briefly first, or may request additional information about the scope and content of the interview. You should attempt to accommodate all such reasonable requests. Be flexible, but insistent. If you did a good job in developing your project plan there will be no one that you wish to interview now who is not an important part of the process.

Use the Interview Sheets to review the information you expect to cover. Explain that the interview is not intended to require any preparation on the part of the interviewee. Be willing to meet with designated representatives if necessary, or with small groups. If requested to meet with additional people, try to do so. The interviews are a key component of the data collection process, and these face-to-face discussions will reveal many aspects of your Support Center's situation that reports and statistics cannot.

## ***Review Documentation***

Now is the time to review in detail the documentation that you have collected. Each document should be read carefully and checked for accuracy, completeness, currency, the ease (or difficulty) of obtaining it, and usefulness. As you review each document, record key statistics and other quantitative data. This will simplify your work when it is time to analyze the data and complete your analysis. Remember, you are not analyzing or drawing conclusions yet. Concentrate on assembling the most comprehensive and complete set of information you can. You will assemble the pieces of the puzzle in the next phase of the project.

## ***Conduct Interviews***

After completing your documentation review, you are ready to complete the interviews with the key managers, staff members and customer representatives identified in your project plan. It is important that you are well prepared to make the most of each interview. Avoid "question and answer" session interviews. Use prepared notes to prompt for the information you want, and encourage each interviewee to speak freely. Typically, you will find that most of what you wished to cover will be discussed in the course of the interview with minimal prompting.

## ***Observe Live Operations***

The final step in your data collection is the direct observation of your Support Center in action. This will serve to fill out any gaps in the information you have already collected from your interviews and documentation review. It will also provide a first hand impression of the real, “hands on” operation of the center. Even if you are already quite familiar with the way things work, this is an opportunity to take a fresh look, perhaps from a new perspective. Take the time to listen in on live calls. Visit the center at different times of the day, and over different days. Observe the interactions among the staff. Note how the physical layout of the facility support or impede interaction and the flow of work. Observe the use of the tracking systems, knowledge tools and other automation.

Refrain from judgments at this time, concentrating instead upon capturing as much information and impressions as time permits. This will provide depth and perspective to your other data.

## **Analysis Phase**

The final phase of your project is the analysis of your data, and developing your recommendations for action. You will then use the information that you have collected to identify the specific strengths and weaknesses of your Support Center, and to develop recommendations and plans for improvement.

### ***Compile and Enter Data for Analysis***

Begin by reviewing your notes and documentation. At this point you should be forming an impression of the important issues and where the most important strengths and weaknesses of your particular operation are found. It will be useful to compile your notes and observations into a single source document. This can later form the basis of your formal assessment report.

### ***Compare to Benchmarks***

If you have done research or visited other Support Center operations in the past, this is a good time to compare the results of your observations against how other centers have operated. Note significant differences, good or bad.

### ***Analyze Results and Develop Recommendations***

Once you have completed organizing your data, the results should be reviewed to identify the areas of greatest opportunity. Use the data collected in your documentation review, interviews and

observations to identify as specifically as possible the reasons for the low performance areas. Create a working list of problems, opportunities for improvement, significant risks and possible enhancements that would improve performance in these areas.

After analyzing your results, examine your working list closely. Sort the items into related groups that might be addressed by a common action, change or solution. It is likely that you will find that you have about half a dozen such related groups. These will be the basis for your recommendations for change. For each group, develop a recommended action that, if carried out, would have resulted in improved Support Center performance. Capture these key recommendations.

### ***Prepare Reports and Presentations***

Unless the results of your evaluation are translated into concrete actions and improvements, they are little more than interesting information. And unless you are able to fully implement your recommendations with your own staff and resources, this means that you will need to communicate the results of your assessment, and your key recommendations for change, to others who may not be familiar either with the assessment or, perhaps, even the Support Center itself.

### ***Develop Action Plan(s)***

The last step in your project should be to develop specific Action Plans for implementing changes and improvements that are designed to enhance your operations and show measurable results. In the absence of this last step, all of your efforts are largely for nothing. The success of your plans will depend upon how well you have won the support of those managers, functions and organizations whose assistance you will require to implement the plans.

***Give your Action Plans time to mature, and take effect. You may wish to repeat your evaluation at a later date to gauge the effectiveness of the changes you have put in place.***

## **About Renaissance Partners, Inc.**

Renaissance Partners is a respected management and operations consulting firm focused on helping clients across all industries improve business performance through better customer support services. Renaissance Partners helps motivated clients develop customer service and support as a strategic leverage point for improving organization-wide business performance. Working with clients around the world, Renaissance Partners redefines and re-engineers customer support services to leverage productivity improvements, raise customer satisfaction, and increase business success.

### ***Practice Areas***

**Support Services Consulting:** By redefining the support services organization, the escalating challenges you face can become a motivating force to push the organization to increased efficiency, profitability and prominence. Services include: Operations, Technology, and Outsourcing Assessments; Technology Selection and Implementation, Service Level Development and Management, Organizational Development; Staffing and Scheduling Analysis; Process Re-engineering; Customer Surveys; Project Planning; and Project Management.

**Staff Training and Organizational Development:** Renaissance Partners provides seminars, workshops and team building engagements developed to change existing behaviors and make support organizations more effective *now!* Offerings include: Customer Service Skills, Team Skills and Team Building, Effective Support Center Design, Effective Staffing and Scheduling, Service Level Management, and High Performance Management.

**Vendor Services:** To build maximum, mutual benefit for both customers and providers of support products and services, Renaissance Partners works with industry vendors providing: Sales Training and Market Orientation Workshops; Executive Briefings; Business Feasibility Studies; Product Concept Design Studies, and Market and Customer Research.

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