PRACTICAL HANDBOOK – COURSE ON BPO'S

Using role play method practice the customer handling procedure

10 Marks (24 Periods)

Telephone handling skills

Key points to be remembered;

TELEPHONE HANDLING SKILLS

The place where we provide telephonic customer services is called a contact centre or a call centre. There are two main types of call centers: - inbound and outbound

Inbound Contact Centre: - An inbound call center takes incoming calls. Inbound call centers can be customer service departments, tech support numbers, sales inquiries coming from a published number on a website, complaint hot lines, service departments, or even your receptionist if you only have one published number.

Functions: - The major functions handled in inbound call centers include the number of calls being handled, the quality of these calls, and how these calls were handled or directed.

Outbound Contact Centre:-An outbound call center makes calls to outside parties. For outbound call centers, some major applications include sales, marketing, confirmations, fund-raising and quality control.

Functions: - The agents are required to make calls, for collections, sales or marketing, etc.

Skills required for handling calls:-

- **Communication Skills**
- **Active Listening Skills**
- **Paraphrasing Skills**
- **Empathy**
- **Probing Skills**
- **Problem Solving Skills**
- **Task rapport Balance**
- **Customer Service Skills**

Role play 1

Background: - New York's "A" Grade Travel co. "Travel Cruise" was known for its Holiday Tours and Travel Packages for families. Mr. Johnson planned a holiday to the country side and was quite excited about spending a good time with his Family. He had made plans to go to the Beach and rent an accommodation for his family's comfort. He made a Phone call to "Travel Cruise" to make the arrangements.

During his call he was made a promise to receive his conformation and the holiday package details by the agent. The agent confirmed the holiday to Mr. Johnson and took his credit card details.

After receiving his account statements from the bank – Mr. Johnson was surprised that he was billed twice on his Credit card and he didn't receive the package on time as committed by the Holiday Company. After calling the bank he got even more worried as the customer service agent hung up on him after listening to his problem.

Mr. Johnson again called the holiday co. and asked for the customer service. He had to explain his problem and the matter was still pending. He wanted to speak with the supervisor or the manager however he was told that usually the manager do not take calls and the agent was very rude to him.

Mr. Johnson felt cheated and thought there is a fraud done with him. So he called the bank once again however the customer care officer told him that there is some technical error and he needs to call after two days.

However that would not just solve the purpose, two days seemed to be a very long time for Mr. Johnson. He was feeling absurd and was also skeptical about his getting his money back. Very next morning he got his welcome kit however it had an apology letter which stated that due to technical error his package was cancelled, when he got to know that he will not be able to go for a holiday, he got mad at the company and decided to file a case in the consumer court.

Right after he received his welcome kit, he received his bank statements and found that the money was not reversed into his account as committed by the Holiday Co.

His Concern: - Mr. Johnson is in a situation where he is unhappy, the holiday co. has cancelled his holiday and charged him twice on his credit card. The bank is not giving him the clarity as to what happened. There is a heavy interest amount which has been charged to him for exceeding his credit limit.

Scenario: - When Mr. Johnson called "Travel Cruise".

With a help of a role Play – enact the scenario and demonstrate Customer service and its impact.

Guidelines / Instructions

Form groups of four each and choose the character you want to play

- Client
- Customer Care Representative
- The Manager

One person in the group will give the overview of the entire scenario and describe the characters in detail and keep a check on Time. After the role play prepare a log sheet noting the good points of the call and areas of improvement in light of skills discussed above.

Points to check for:-

Communication Skills

- Use of Language
- Vocabulary
- Rate of Speech

Role Play 2

Based on outbound call scenario:

Background:

Automobile Association is a well known automobile insurance company in America that has originated from the United Kingdom. It's also called as the AA. Mary clack owns a ford fiesta and her car gives her problem every six months so she keeps calling the AA for assistance hence a sales representative calls her one day and offers her a good deal wherein her car could be insured by the AA for 6 months at a very low price.

Key telephone Skills: Customer service, empathy, selling skills.

Role play

CSR: Hi good morning may I speak with ms Mary Clark please?

Customer: yea I m Mary

CSR: hi Ms Clark my name is Steve Williams and I am calling you on behalf of AA The Automobile Association. Is it a good time to speak with you?

Customer: yes…… what's that all about?

CSR: Ms Mary if you remember once your dad was not well and your ford fiesta had a flat tyre on the highway and you called us for repair.

Customer: oh yes guys have been a great help.

CSR: Thanks a lot Mary. since u often call us for maintenance purposes hence our company has decided to offer you a cover for 6 months that will include regular maintenance and any where at any time if your car gets stuck we will reach that place for help within half an hour. so Mary how does that sounds to you?

Customer: That sounds great…However how much is the cost of the cover?

CSR: Mary you will be surprised to know that we are offering you this cover only for 99 dollars.

This will include repair of all the engine parts, battery, cooler, and radiator for the six months.

So should I go ahead and register you for this service?

Customer: Oh yes I really want to take this cover.

CSR: Alright so May I take the registration number of your car?

Customer: Yes its AZ0001MNS

CSR: Alright, I repeat its AZ0001MNS is that correct?

Customer: YES

CSR: and what's the model and make of your car?

Customer: its ford fiesta.

CSR: it's a nice car

Customer: ha-ha…thanks

CSR: what would be the mode of payment Mary? Though credit card debit card or by cheque?

Customer: I will use my credit card.

CSR: Alrite so what's the credit card number?

Customer its 4000348906541234.

CSR: alright I repeat your credit card number is 4000348906541234

Customer: yes that's correct

CSR: thank you, and what will be your mailing address?

Customer: It's 455 Park Avenue, Richmond drive, Fairfax city-20008

CSR: alrite so it's   455 Park Avenue, Richmond drive, Fairfax city-20008

Customer: ya that's correct.

CSR: Alright Mary that's the only information that I need as if now. You will get everything in writing along with your membership card within 2-3 business days.

Customer: Alright

CSR: so thank you for your time and you have a great day ahead. Bye

Customer: bye bye

Form groups of four each and choose the character you want to play

- Customer
- Sales Representative
- The Manager

One person in the group will give the overview of the entire scenario and describe the characters in detail and keep a check on Time. After the role play prepare a log sheet noting the good points of the call and areas of improvement in light of skills discussed above.

Key points in these role play:

It is very important to check time with the customer as when a call has been made without an appointment there is no surety whether the customer would be free or busy and there is also a possibility that we end up calling a customer at odd timings as well hence it's always important to find out whether it's a good time to talk or not.

Customer liked the product because the automobile association associate described the product very well as he was very good with the product knowledge and he made the customer understand the importance of the product and at the same time product was very reasonable as well hence it was true value to money.

Role Play 3

Handling an irate Customer

Mr Williams is a very old customer of XYZ bank and had always been very happy with the kind of services that he got from his bank hence he always had a lot of faith and mental satisfaction being with the bank however one day all of a sudden he realized that his bank has deducted the amount of 80 dollars from the account and there was no reason for that he felt very bad and even the bank did not call him and apologize for the mistake hence he felt embittered and then called the bank with anger however the customer service executive was really skilled so by using the right customer service techniques she was able to retain the customer .

CSR (Customer Service representative): Thank you for calling XYZ Bank I am Nelly .How may I help you?

Customer :(angry) I hate yr bank you are cheaters'' you have deducted 80 dollars from my account for no reason want my money bank. (Screaming)

CSR :(patiently) I understand your concern and would have felt the same in this situation (empathize)

However don't worry as I am here to help .May I request you to stay online for a few moments while I Research your query

Customer: No I want the information right now / Creating Credibility (Resolution)

CSR: I certainly don't want to give you incorrect information I need to research the query. I assure you that this would not take much time.

Customer: ok ...ok...Don't take ages ...please find out. (Anger)

CSR: Thanks for your patience Mr. Williams. You are correct .its our error and I apologies .I have also put the complaint. And the amount of 80 dollars will be transferred to your account within 24 hrs as it happened due to technical error. And I will personally take care that such things don't happen again.

Customer   : That's good

CSR   : so Mr. Williams I hope this resolved for you, Is there anything else with (product) I can help you with?

Customer: Nops (American slang for the word "no'') that ok you have been a great help.

CSR: alright so thank you for calling xyz bank, once again you were talking to Nelly Have a great day ahead good bye.

With a help of a role Play – enact the scenario and demonstrate Customer service and its impact.

Guidelines / Instructions

Form groups of four each and choose the character you want to play

- Client
- Customer Care Representative
- The Manager

One person in the group will give the overview of the entire scenario and describe the characters in detail and keep a check on Time. After the role play prepare a log sheet noting the good points of the call and areas of improvement in light of skills discussed above.

Key points of the call:

If the customer is very angry then we should listen to him with patience. and if the mistake is on our part then apologize and then provide him with the best possible solution.

CSR was able to give a solution to the customer as she was very patient and she heard the problem of the customer then empathized immediately to the customer and after accepting the mistake she gave a solution for his problem

An appropriate way to put the call on hold is to ask the permission from the customer and then thank him for being on line so that the customer feels the acknowledgement.

Communication skills : oral and written

Key points to remember:

Important forms of oral communication at the workplace include:

- Building interpersonal relationships.
- Giving presentations and debating viewpoints effectively.

You need to master oral skills for both in-person and over-the-phone interactions.

Similarly, important written communication includes:

- Writing professional e-mails (sans SMS slang).
- Putting together concise reports.
- Creating visually powerful PowerPoint presentations.

And the key to acing oral and written communication is to spruce up your communication skills. Here are some easy tips to improve communication

1. Improve pronunciation and diction

There are a few tricks to making a vernacular accent more globally understandable.

Try making sure that 'air' comes out of your mouth when saying the letters, 'T, P, K' and the sound 'Ch'.

Focus on elongating your vowel sounds. This will also automatically slow down your rate of speech.

Sing English songs out loud!

Watch news shows on channels like CNN and BBC.

The web site www.m-w.com is great for pronunciation help.

There are a lot of books on pronunciation and language that come with audio cassettes.

A good book that I found really useful was *Better English Pronunciation* by J D O'Connor. It is part of the Cambridge series, and some of those books come with cassettes.

2. Spruce up your writing skills

~ Well-written magazines, like *The Economist* and *India Today*, are great to read not only to improve language skills but also to learn more about the world.

~ In terms of books, read what interests you. The basic goal is to read as much as you can. There are a plethora of good authors who are popular today. Some good writers whose language is easy to follow include Vikram Seth, Jhumpa Lahiri, Paulo Coelho, J D Salinger, Albert Camus and Roald Dahl.

~ People tend to forget basic grammar when writing e-mails. An e-mail is nothing more than a letter which is sent electronically.

Make sure salutations and content are professional. Use special phrases when attaching documents. For example, "Please find attached with this e-mail a report on..." This helps you sound professional.

Role Play exercises:

Pretend you are a newscaster and read out the newspaper to the group focussing on diction as per points suggested above

Presentation Skills

The Beginning

It is imperative to plan your beginning carefully; there are five main elements:

Get the attention of audience

Too often in a speech, the first few minutes of the presentation are lost while people adjust their coats, drift in with coffee and finish the conversation they were having with the person next to them. You only have a limited time and every minute is precious to you so, from the beginning, make sure they pay attention.

Establish a theme

Basically, you need to start the audience thinking about the subject matter of your presentation. This can be done by a statement of your main objective,

Present a structure

If you explain briefly at the beginning of a talk how it is to proceed, then the audience will know what to expect. This can help to establish the theme and also provide something concrete to hold their attention..

Create a rapport

If you can win the audience over in the first minute, you will keep them for the remainder..

The Ending

The final impression you make on the audience is the one they will remember. Thus it is worth planning your last few sentences with extreme care.

Draw a Picture

The human brain is used to dealing with images, and this ability can be used to make the message more memorable. This means using visuals techniques like signs, pictures, metaphors or analogies to express your message.

Role play:

Divide students in a group of four and using a blackboard or a PowerPoint presentation explain the strengths, weaknesses, opportunities and threats to Indian Economy. Use a lot of diagrams, graphs and data to build the case.

After the presentations, you should try to discuss performance in light of points above. Decide what was the least successful aspect of presentation.

Trainers Skills

- Training is a skill and a skill cannot be taught however a person can be trained on it. Trainers are the people in every company who help the company to maintain its quality standards. They are like filters and keep filtering the knowledge of employees from time to time. Trainers train the employees depending on the skills and the requirement of the company. such training programmes are called OJT(On Job Training)

Nature of Work

1. Introduce the employees to the concept of customer service and train them on basic telephone etiquettes, business communication and also written communication.

2. To conduct training in:

Communication

Personality Development

Grammar for companies in the Customer Service

Time Management

Customer Focus

Accent Neutralization

Voice Training

Phonetics Modules

Presentation Skills

Culture Sensitization

3.   Identification   of   training   needs

4.   Preparing   training   Calendar

5.   Maintaining   Database   and   Preparing   MIS   reports   on   training

6.   Taking   training   feedback

7.   Evaluation   of   training   effectiveness

8. Planning of schedules and long-term planning of training programs

9. Conduct new hire training to bring new joinees up the learning curve as per the requirements

10. To develop a training planner for the year based on the training need analysis

11. To develop training material and appropriate delivery methods for new hires as well as   new   initiatives   for   existing   staff

12. To track progress and maintain records of all training activities

Skills   and   Attributes

Skills and attributes required to become a successful trainer are:

- Aptitude: Towards people management & counseling
- Key Competencies: Content development abilities
- Attributes: Good people skills
- Excellent command over English
- Good personality
- Excellent Communication & team handling skills
- Self Driven Person
- Excellent presentation skills
- Ability to train on language skills
- High energy, enthusiasm and hands on approach
- Logistics and Resource Management ability
- Transfer information in a simple and effective manner with clear and concise communication
- Should have core competency in conceptualization, designing and conduct of employee development programs in technical, behavioral and skill development
- Have the ability to give learners feedback and coach them towards improvement

Role Play:

Problem Definition

When interest rates fell, HDFC experienced an unprecedented demand for their products. To accommodate the surge in demand, the company set a goal of hiring and training approximately 1,500 processors and closers within four months.

These employees were being hired at approximately 30 different operations centers across the country. Some of these new hires had experience in the industry, but all of

them needed training on the company's specific policies, products, and mainframe systems. The training department has to conduct week-long courses for mortgage processors and closers.

Divide the class into 2 groups – for preparing training module and then other group would conduct training based on that training module.

Cultural Adaptability Skills

<u>Cultural Adaptability skills:</u>

IN a BPO environment people come from different countries and work together irrespective of different language, culture and time zones. Cultural adaptability means to adapt the culture of different places and accept it in such a manner that all the people from different backgrounds work under the same roof in a way that leads to mutual success more business good relations. Understanding and empathizing with different cultures is important for success.

Role play exercise:

Divide class into 10 groups and each group is assigned one of the following values. The groups would have to explain the importance of value and demonstrate these by enacting them in daily conversation.

AMERICAN VALUES

1. INDIVIDUALISM AND PRIVACY
2. FREEDOM
3. EQUALITY
4. ACHIEVEMENT AND ACTION
5. PROGRESS
6. PURSUIT OF HAPPINESS
7. TRUST
8. INFORMALITY
9. DIRECTNESS
10. RISK TAKING

Case study

The case study encompassing the following: **30 Marks (72 Periods)**

- o Document High level process mapping
- o Solution identification with Adapted process
- o Training Plan
- o Computation of As is Process Cost
- o Computation of Adapted Process Cost
- o On Job Training and pilot plan
- o Ramping Up & Ramping down plan
- o Billing & collections
- o Documenting process performance metrics
- o Client Communication
- o Senior Management Communication
- o Identifying areas on process improvements
- o Solution designed on process improvements
- o Solution mapped on Business Continuity / Disaster Recovery
- o Analyzing voice of customer

Key Points:

High Level Process Mapping & Solution Identification

High Level Process Mapping & Solution Identification is an important tool in this detailed analysis. High Level Process Mapping enables an organization to define, document, analyze, prioritize and recommend solutions and follow-up plans to move the company toward its financial and customer-focused goals. A high level process map contains the essential parts of a process and focuses on performance goal.

Mapping of "As Is" Process:

Once this high-level mapping has been done to understand strategic issues, the next step is to explore these strategic issues in-depth. In case the process has to be migrated, it is important for both the client and the BPO to carry out a Mapping of "As Is" Process. An "As Is" Process refers to a process which is already in place at a client's site and is likely to be migrated to a BPO.

Mapping of As Is Process is an extremely powerful diagnostic tool for an organization which helps in analyzing the flow of work and information to understand process issues and also to uncover structural difficulties, quality challenges, and people issues.

Standard Operating Procedures:

A standard operating procedure is a set of instructions covering features of different operations to establish a definite or standardized procedure without loss of effectiveness. Standard Operating Policies and Procedures can be effective benchmarks to drive performance improvement and improving organizational results.

Every good quality-system is based on its standard operating procedures (SOPs).

Concept of Pilot/ Pre Production:

Companies normally test their offshore readiness and vendor's quality by doing an initial pilot project at BPO site. These projects are generally not high profile, extremely large or too dependent on other systems.

A pilot project is a replica of the entire process on a smaller scale to assess the ability and quality of the BPO to execute the process. It usually comprises a small team which includes an agent, managers, and quality analysts. If the pilot project gives a satisfactory output, then the actual project would come to the company.

Transition Budget

Companies that outsource processes to third-party service providers need to ask tough strategic questions such as - What are the factors that companies figure in when they select their BPO service provider. How should the service agreement be structured to ensure that there are no defaults? What is the composition that companies must opt for - in-source, co-source or a stake in the operation - in order to be able to exercise controls over processes and quality?

Whenever a process is being outsourced to a BPO, the transitioning phase from a client site to vendor site is very important. The success of a transition project is determined by scope fulfillment, schedule adherence and cost. It is important to ensure that the project task, hours, resources into the project plan are properly planned out and project plan is prepared on each project

Billing & On Job Training

A BPO contract is drawn after a detailed understanding of the cost model, HR issues, business continuity, metrics, payment models, terms and conditions, provisions for changes. One of the important components of negotiations is determination of payment terms and conditions, e.g., pay up-front or over an extended period.

On-the-job training (OJT)

When the process has been migrated and a small pilot process has started, the process manager starts looking for opportunities to improve the process. Training people is an

important component of this strategy. On-the-job training (OJT) is one of the best training methods because it is planned, organized, and conducted at the employee's worksite.

Mapping of Adapted Process

Even as the process is being migrated from client to vendor, it is important to ensure Continual Process Improvement through Six-Sigma and other techniques. Mapping of adapted process is a technique to improve processes after migrating. There are several tools for Mapping of Adapted Process.

Process Performance metrics

Performance measurement is an important cornerstone of the contracts between the client and the BPO for the operation of its laboratories. As soon as process is migrated from client site to vendor, Process Performance metrics should be designed to encourage performance improvement, effectiveness, efficiency, and appropriate levels of internal controls. They should incorporate "best practices" related to the performance being measured and cost/risk/benefit analysis, where appropriate.

Critical To Quality - CTQ

CTQs (Critical to Quality) are the key measurable characteristics of a process whose performance standards or specification limits must be met in order to satisfy the client. They align improvement or design efforts with customer requirements. CTQs represent the product or service characteristics that are defined by the client.

Process Ramp up and Ramp down:

After the pilot process has been launched, feedback from client is sought to explore process development opportunities. If the client is happy with pilot process and once process managers are comfortable with the pilot process, the next step is to 'ramp up" the process. The 'Ramp up" of project refers to expansion of project from pilot phase to full capacity phase. It involves hiring and training new agents so that the BPO can handle more work.
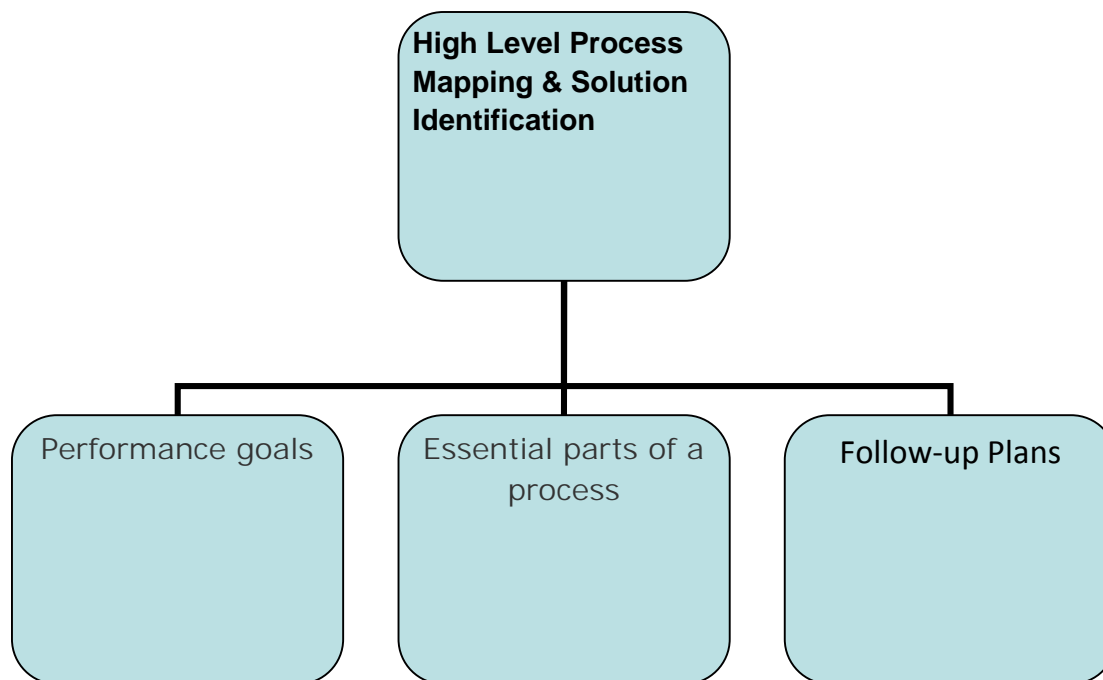
Case study:

A leading mobile company decides to outsource its entire Customer Inquiry operation to a BPO. Prepare a detailed case study including the following steps;
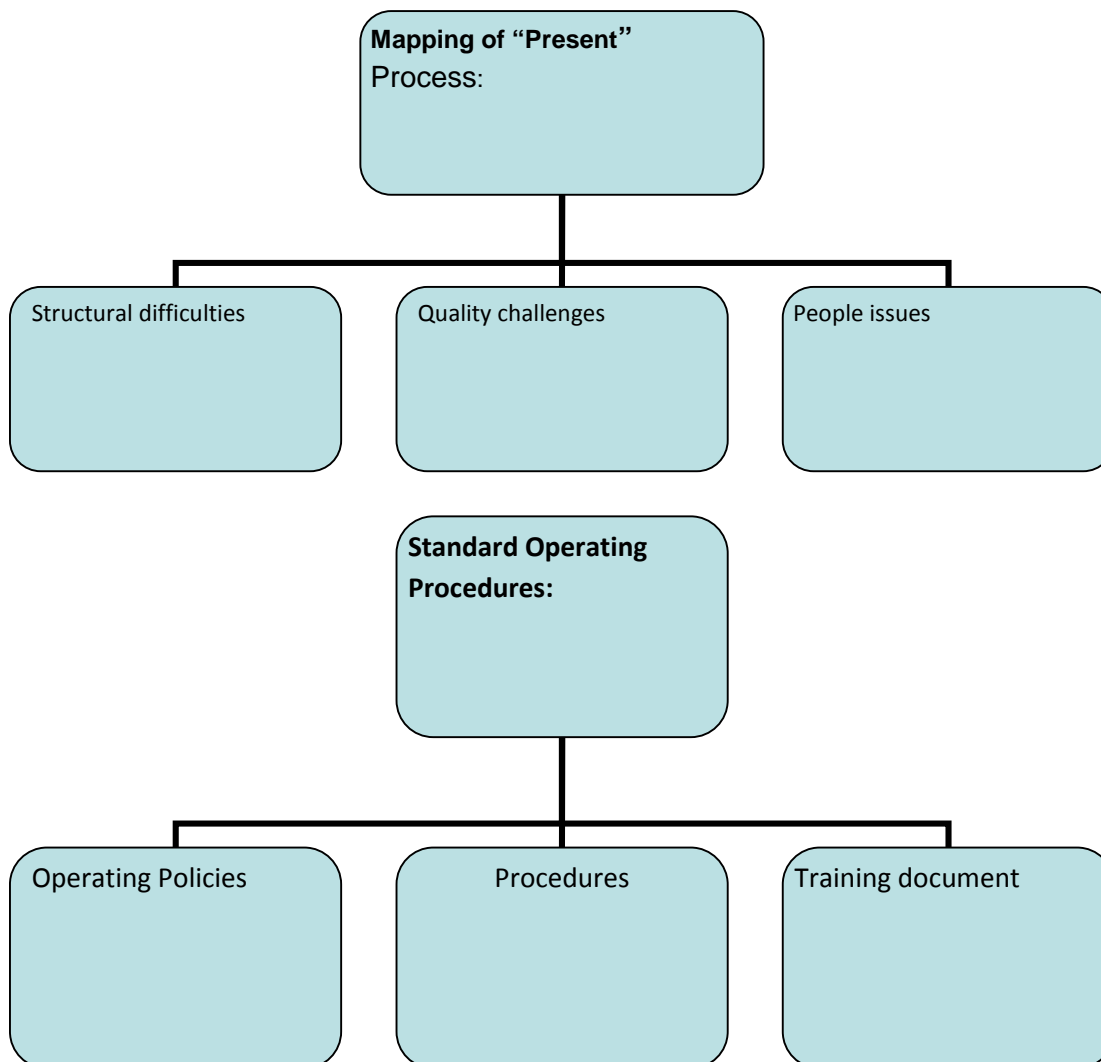
Document High level process mapping

Customer service strategy is a key pillar of company's marketing focus. Identify the five key steps in customer service and prepare a 'high-level' document setting out the vision, strategy and framework for improving customer service for the company. Identify the five key actions items for customer service improvement strategy.

Prepare a flow diagram as illustrated below;

High Level Process Mapping & Solution Identification

Performance goals

Essential parts of a process

Follow-up Plans

Solution identification with Adapted process

Identify challenges in the present customer service which is being offered by company(like slow response, customer service agents not having enough knowledge etc.) and prepare a action plan to take care of these challenges. The action plan could include standard operating procures for process in BPO, training plan for agents in the BPO, key result areas for process (eg. improving time taken to resolve complains) and outline of process in BPO. Prepare charts as illustrated.

Mapping of "Present" Process:

Structural difficulties	Quality challenges	People issues

Standard Operating Procedures:

Operating Policies	Procedures	Training document

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Training Plan

On the basis of above step prepare a training plan to train agents of BPO keeping the key process metrics in mind. Key components of the plan would be:

1. Training goal
2. Learning objectives
3. Learning methods / activities
4. Documentation / evidence of learning
5. Evaluation

Identify the key stake holders in the process and list out key activities for each of them throughput training process.

Computation of as is Process Cost:

Cost assigned to a business process at mobile's company's site based on the cost of the activities that compose the process.

This could include cost under various heads like salaries, Building, logistics etc.

Key assumptions;

Number of customers to be serviced and no. of calls per day

Estimation of number of agents required

Infrastructure and logistic costs under different heads

Training and operation costs

Computation of Adapted Process (Process at BPO) Cost :

Cost assigned to a business process at BPO based on the cost of the activities that compose the process.

This could include cost under various heads like salaries, Building, logistics etc.

Key assumptions;

Number of customers to be serviced and no. of calls per day

Estimation of number of agents required

Infrastructure and logistic costs under different heads

Training and operation costs

Pilot plan

Prepare a pilot plan for a small initial roll out of the process for BPO. Prepare a broad summary sheet establishing viability, technical issues, and overall direction, as well as providing feedback for budgeting and other forms of internal decision making processes
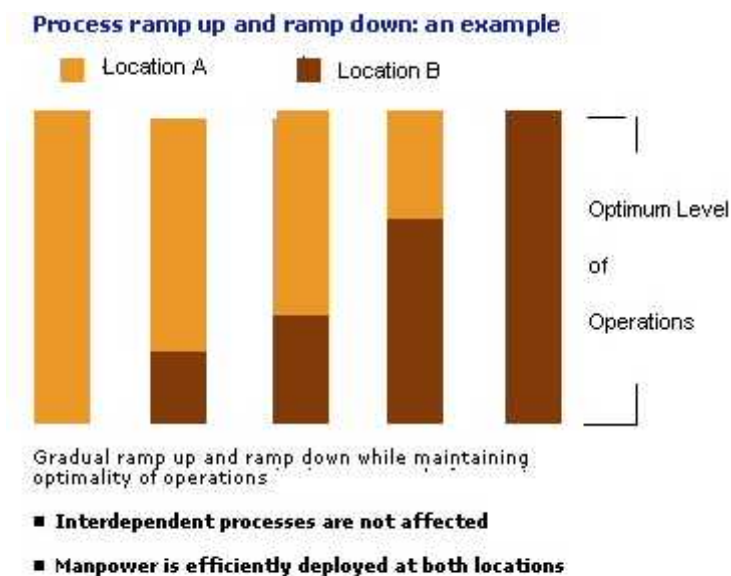
On the Job training:

Use the following model to prepare an on the Job training plan for BPO process.

Ramping Up & Ramping down plan

Prepare a Ramp-up plan for expansion of project from pilot phase to full capacity phase. Prepare a sheet estimating the number of days for the entire expansion plan and prepare a timetable. Prepare a sheet outlining a plan for hiring and training new agents so that the BPO can handle more work. Prepare a plan to ensure the training and Quality management resources are sufficiently raised up to meet the increased demands of the process.

Once a time table for the expansion has been identified, prepare a diagram as shown below showing progress of the project. On the diagram, show various stages of process and at every stage plan resource allocation at BPO site.

Process ramp up and ramp down: an example

Location A   Location B

Optimum Level of Operations

Gradual ramp up and ramp down while maintaining optimality of operations

- Interdependent processes are not affected
- Manpower is efficiently deployed at both locations

The process is being moved from location A (mobile company) to Location B (BPO) and as shown in figure location A is gradually reducing its capacity ("ramping down") while Location B is gradually increasing it's capacity by hiring more people.

Key points to be kept in mind for this plan:

Define an optimum capacity of the project. At every stage, the optimum capacity of the process is maintained.

The gradual increase in manpower at location B (BPO) to ensure training and Quality Monitoring can be properly managed.

Billing collections

Prepare a plan for the BPO to bill its service to the client (mobile company)

Within the class discuss different models of payment terms and conditions and their suitability

Pay up-front or over an extended period

Fixed pricing

Full-time equivalent pricing

Seat pricing

Define the priorities for the process, choose appropriate pricing model and prepare a model pricing structure for the process on the basis of pricing model.

Documenting process performance metrics

Process Performance metrics should be designed to encourage performance improvement, effectiveness, efficiency, and appropriate levels of internal controls. They should incorporate "best practices" related to the performance being measured and cost/risk/benefit analysis, where appropriate.

Performance metrics are designed for a quantitative assessment of gains in:

Customer Satisfaction

Organizational Performance

Workforce Excellence

The key elements of the performance metrics should address:

Alignment with Organizational Mission (Most BPOs have mission statements aligned towards client/customer satisfaction)

Cost Reduction and/or Avoidance

Cycle Time Reduction

Meeting Client Commitments

Customer Satisfaction

The Process

The first step in developing process performance metrics is to involve the people who are responsible for the work to be measured because they are the most knowledgeable about the work. Once these people are identified and involved, it is necessary to:

Identify critical work processes and customer requirements.

Identify critical results desired and align them to customer requirements.

Develop measurements for the critical work processes or critical results.

Establish performance goals, standards, or benchmarks.

Determining the Quality of Metrics

The following questions serve as a checklist to determine the quality of the performance metrics that have been defined.

Is the metric objectively measurable?

Does the metric include a clear statement of the end results expected?

Does the metric support customer requirements, including compliance issues where appropriate?

Does the metric focus on effectiveness and/or efficiency of the system being measured?

Does the metric allow for meaningful trend or statistical analysis?

Have appropriate industry or other external stands been applied?

Does the metric include milestones and/or indicators to express qualitative criteria?

Are the metrics challenging but at the same time attainable?

Are assumptions and definitions specified for what constitutes satisfactory performance?

Have those who are responsible for the performance being measured been fully involved in the development of this metric?

Client Communication:

Prepare a strategy for effective and regular client communication. Prepare a sheet containing following:

Initial Phase – during establishment of process

Client objectives and expectations

- o specific services the client will receive from the BPO
- o specific results the BPO is likely to achieve for the client
- o costs associated with achieving those objectives
- o time required to achieve the results

client's instructions

- o choice of options or strategies the client instructs the BPO to pursue
- o impact of choosing particular options or strategies
- o estimated costs relative to those instructions

advice given to the client by BPO

- o options recommended

course of action

- o strategy to be undertaken by the BPO
- o estimated length of time required to complete the strategy
- o Preliminary plan or outline of steps to meet the deadline
- o risk analysis

Communication during course of project:

- manner of communication between BPO and client if communications are to be primarily by
  - o telephone, the telephone number or numbers and the person or persons with whom messages may be left
  - o e-mail, e-mail address
  - o mail, mailing addresses
  - o courier, courier address if different from mailing address
  - o priority post, mailing address
  - o facsimile, facsimile numbers

- How the BPO will keep the client apprised of the process on an ongoing basis. Methods of keeping the client informed on an ongoing basis may include sending the client copies of
  - correspondence, including e-mail communications sent or received
  - documents relating to the matter
- how the client will keep the BPO apprised of the matter on an ongoing basis
- frequency of reporting to the client
  - formally thro mails
  - on an informal basis
- estimated time it will normally take for the BPO to respond to client calls, e-mails, letters or other communications.
- Who within the BPO would engage with client

Senior Management Communication

- How the senior management within BPO organization will keep a tab on the process, how will they be apprised of the process on an ongoing basis. Methods of keeping them informed on an ongoing basis may include sending them reports from training, quality and operations. Design some sample reports
- Mechanism for suggestions and complaints.
- frequency of reporting to the management
  - formally thro mails
  - on an informal basis
- Estimated time it will normally take for them to respond to suggestions, complaints or other communications.

Identifying areas on process improvements

Plan out different ways of identifying areas of improvement;

One of the ways is to assess the gap between the customer expectations and process output through a customer survey wherein customer feedback on quality of services is recorded along with ideas on improving service. Design a survey along these lines and identify areas of improvement.

Design brainstorming sessions with the agents, managers and quality teams (collectively called process owners) to identify small areas for improvement which could be taken up as projects.

Design a root cause analysis project for identifying the first or underlying (root) causes of problems

Solution designed on process improvements

It involves following steps:

- Defining the organization's strategic goals and purposes
- Determining the organization's customers (or stakeholders)
- Mapping the existing process
- Aligning the business processes to realize the organization's goals

Design Process Improvements should follow following principles:

Process orientation to Business Goals: An organization's goal should be the key driver for any business process. All process, people and resources should be directed towards business goals. This would facilitate the process improvements in line with the organizations goal.

Customer focus: Keeping in view the changing customer needs, the business process should be aligned to higher customer satisfaction.

Benchmark regularly: An effort should be made to analyze in depth if the new improved process would meet it's objectives. Therefore the organization must establish **benchmarks**, or a set of standards, against which the process must be measured. The benchmarks themselves must be quantifiable, attainable, and realistic.

Establish who owns a business process: Specific people, the *process owners*, must be placed in charge of a business process, be responsible for the performance and changes in the process, and be responsible for the success or failure of process improvement goals. Without personal accountability, the process improvements will not make the desired impact.

Build control points into a process: There should be frequent **control points** where the process owners and customers/stakeholders can decide if the process is meeting current benchmarks and what they should do with the process. This may include halting the process if it fails to meet realistic benchmarks.

Standardize similar processes: Many organizations rely on an ad hoc approach to business processes. They make them up as they go along and change them without deliberate planning. A standardized system of preparing processes saves time, effort, staff   hours,   and   money.

Solution mapped on Business Continuity / Disaster Recovery

Design a Business Continuity / Disaster Recovery plan for the process that will keep company up and running through interruptions of any kind: power failures, IT system crashes, natural disasters, supply chain problems and more

Identify which systems and business units are most crucial to the company.

People are responsible for declaring a disruptive event and mitigating its effects.

establish a process for locating and communicating with employees after such an event. In a catastrophic event (like an earthquake), the plan will also need to take into account that many of those employees will have more pressing concerns than getting back to work.

Prepare a plan for information technology recovery in case of disruption due to a disaster. Focus on systems recovery, data backup plan etc.

Analyzing voice of customer

Voice of Customer

The aim of a Voice of Customer analysis is to understand how the customer perceives the value of your products and services as well as all interactions with business.

Prepare a plan to do a detailed analysis on how customers perceive the value of offering vis-à-vis the competition that allows management to take actions to improve performance.

Develop a questionnaire and conduct the mock interviews within to address the gaps. Record your findings.