Transforming Back Office Efficiency: Five Steps to Peak Performance

Introduction
Most businesses have invested in optimizing their customer-facing processes. In today’s contact centers, highly trained agents armed with scripts and tools manage multiple channels. Supervisors monitor workload in real time and analyze agent performance and productivity. Operations are streamlined and customer service is analyzed.

But once customer work leaves the contact center for the back office, you might as well be sending it to the dark side of the moon. You don’t know when and how the work will come out the other side.

In most businesses, the back office is where customer needs and requests are actually fulfilled. It’s where you bring customers onboard, bill them, or update customer records. How well you meet customer expectations depends on processes beyond the customer contact center.

The back office isn’t designed for streamlined operations. But you can change that. Technologies are available today that help you optimize the flow of customer-centric work throughout your business, according to your business rules. You can turn the apparent ‘problem’ of back office complexity into an opportunity for competitive advantage.

Complexity Beyond the Contact Center
Once work leaves the contact center, it goes into all kinds of different systems. The workload path and tasks vary widely between industries and companies – no two are alike. But for all their differences, most businesses share the same sets of challenges when it comes to the back office work in support of customer needs:

- **High volumes of work, with fluctuating demand**: Work often comes in unpredictable bursts. This might be due to missed communications with other parts of the business, or to external factors outside your control. If you’re not ready for the volume, you end up with backlogs that can be costly to address.

- **High variability in tasks**: Employees handle a wide variety of different tasks, based on the customer needs. Tasks may require different skill sets, and employees may need to work with multiple, distinct systems to complete tasks.

- **Variations in individual performance**: Different employees will have varying skill, abilities and performance levels. Handling times for tasks vary not only by task, but also by individual. The slow, methodical worker may be highly valued for sensitive, complex tasks but less optimal for high-volume, fast-turn work.
• **No visibility across people, tasks and different systems:** When systems aren’t integrated and people work separately on their own tasks, you have no visibility into the complete set of customer-focused work. Without visibility, you’re just guessing.

The challenge is getting the right work to the right person at the right time to deliver the right service level. You need to align the different moving parts of the back office environment, including systems, people, schedules, tasks, and business priorities.

If you can address these key challenges, you can unlock new efficiencies within the contact center. For example:

- Allocate and manage work to meet service levels and make sure the highest-value tasks are performed
- Align tasks with the people best able to perform them
- Structure workflow so that people are engaged and work is interesting and varied
- Reduce unproductive time spent looking for tasks or figuring out the next step of a process
- Forecast workloads and schedule staffing to eliminate backlogs and overtime
- Track critical customer workflows through the back office

Figure 1: The Back Office Today

The Back Office Opportunity

The challenge is getting the right work to the right person at the right time to deliver the right service level. You need to align the different moving parts of the back office environment, including systems, people, schedules, tasks, and business priorities.
Five Steps to Peak Back Office Efficiency

The back office environment is much too complex to manage using manual oversight and spreadsheets. Enterprise workload management and enterprise workforce management technologies help you connect the diverse people, applications and workloads to meet your business objectives – all in real time.

These solutions connect and align the different moving parts of the back office environment, including:

- Tasks coming from many different systems
- Individual employee’s skills and training
- Employee schedules and availability
- Business priorities and service level commitments

The good news is you do not have to rip and replace current systems. These technologies work with existing systems, people and processes, making them more efficient.

While the process of transformation sounds like a big project, it can be broken into five relatively simple steps:

1. Establish employee presence
2. Create a global task list
3. Prioritize tasks by business rules
4. Assign tasks based on skills
5. Forecast and schedule based on detailed insight

Each provides value independently – but when you execute them together or in sequence, the result is a transformed back office process.

1: Establish Employee Presence

Employees are the most important part of the entire back office operation. The first step in optimizing performance is simply knowing who is available for which type of work. Without this knowledge, you could end up with a time-critical task waiting for an employee who’s at the dentist for the rest of the day. This kind of visibility is built into the front office – it makes sense for all employees on the critical path in fulfilling customer commitments.

2: Create A Global Task List

On the task side, you can seriously improve performance by putting all of the work items and tasks from the many different systems into a single, global task list. This gives you new visibility into the entire scope of work in the back office – visibility that’s essential to tracking performance and planning resources.

3: Prioritize Work

Not all tasks are created equal, and business rules and priorities may shift over time.

Now that you have a global task list, you can automatically prioritize tasks in the list based on configurable business rules. Prioritization helps you make sure that a critical or time-sensitive task doesn’t get stuck behind something lower-value or with a longer schedule. For example, tasks might be prioritized based on:

Customer Journeys

One way to structure the workflow is to look at specific customer journeys (across front and back office) and streamline those processes from end to end. Research from McKinsey & Company suggests that companies who optimize for the customer journey see impact across many dimensions including costs, revenue, customer satisfaction and employee engagement:

Journey-led transformations deliver impact across multiple dimensions

• Overall revenue impact
• Customer/account service level
• Time the task has been in the queue – when a task approaches its SLA commitment, it could move to top priority

And business priorities themselves may shift, perhaps in response to a temporary campaign, an escalation or seasonal trigger. Business managers must be able to shift priorities on the fly, without requiring an IT team to write and test scripts first.

4: Assign Tasks By Skills

Once you’ve prioritized tasks, the next step is to get them to the right people. Rather than waiting for people to choose, assign tasks dynamically based on employee skills and availability. And make sure that the task assignment includes a timing factor, so if someone neglects a critical task, it can be rerouted or escalated.

Using automatic, rules-based task assignments eliminates the problem of people ‘cherry-picking’ the easiest tasks over more urgent ones. It relieves supervisors of trying to manually track and assign tasks, and eliminates worries about unfairness or favoritism in assignments.

You can even set up teams to handle specific types of tasks and rotate people through the tasks, so no one’s stuck doing the same thing every day. A configurable task routing engine, integrated with the workforce schedule can handle all kinds of creative, efficient workforce management strategies.

Having taken four steps above, you’ll have insight into workload and employee status, and control over task priority and assignments. You can track how long it takes people to do tasks to identify skills gaps and help people be more productive and effective.

Figure 2: Assign Tasks by Skills
5. Forecast and Schedule

With visibility into workload, employee status and task assignment, you can start continuously improving the back office performance through better workforce scheduling.

With a better understanding of global workload and priorities, you can make more accurate predictions about workforce needs. This will help you handle fluctuations in volume and the variations in the time it takes to complete tasks.

When supervisors have end-to-end visibility across employees and workloads, they can set priorities and track performance more easily. They can spend less time wrestling with spreadsheets for scheduling and more time working with employees to advance their skills and abilities. And with automated insight, a supervisor can effectively manage more employees, reducing the supervisor to employee ratio.

The peak performance payoff

This isn’t about getting bragging rights for having the best back office around (although that’s a nice side-effect.) Back office processes are critical drivers of revenue and customer satisfaction. Improvements here have a big impact.

If you take the steps outlined here, you can realize a rapid payback through the efficiency gains and cost avoidance. For example, with better visibility into work and automated workflow management, you can realize significant benefits:

Efficiency

- 17-24% increase in workforce utilization
- Peak capacity performance without additional cost
- Reduced supervisor to employee ratio through better automation

Reduced costs

- Avoidance of penalties for missed SLAs
- Reduction in costs of overtime for handling backlogs

Increased revenues

- Reduction in customer churn due to SLA violations
- Accelerated order-to-cash for service implementation and billing tasks
- Increased speed and prioritization to lead follow-up

The top-line benefits are considerable as well – optimizing the customer interaction from end-to-end leads to improved customer satisfaction and reduced churn.

When you do this right, this kind of business transformation improves employee satisfaction and engagement. If you offer training and variety in the tasks, the work remains challenging and interesting. People no longer worry about unfair work assignments, and they benefit from objective, real-time feedback.

“With Enterprise Workload Management, we’re getting the most important and high value work done first. We don’t wait until the end of the month and realize we’ve missed critical work.” Kevin Hurst, FirstEnergy Corp.
Summary
The hard work of your business takes place outside the contact center, across multiple departments, systems and employees. Yet complexity has kept this workload beyond the reach of business process optimization and efficiencies – until now.

Enterprise workload technologies help you get the right work to the right people at the right time, based on the business rules that fit your business in real time. With insight into who is available and what is happening, you can refine and optimize your processes, empowering employees to better serve your customers. This leads not only to better business efficiency, but also increased customer satisfaction and employee engagement.

For more information on Genesys solutions visit www.genesys.com.