Customer Service Job Task Analysis Case Study

Designer: Well, your project sounds interesting, and we're looking forward to working with you. Now, from what you said on the phone, you want to train your <u>bookkeepers</u> to do some of basic customer service representative tasks.

Supervisor: Exactly. That's because, during certain times of the year, our incoming call volume gets too high for our service reps. But, the call increase isn't enough to justify hiring <u>new</u> service reps. So, at one of our quality service meetings, it was suggested that we cross-train our bookkeepers to handle certain types of calls to relieve the pressure on the regular service reps.

Designer: OK. Now, your service reps . . . Do they just take phone calls?

Supervisor: Yes, and about half those calls are for new service installations, so, we plan to train our bookkeepers for that specific type of phone call.

Designer: OK. So, you're planning to have the bookkeepers, during crunch times, be capable of handling service installation calls. Now, would they be answering <u>all</u> the calls that come in, or do you have a way to route those <u>particular</u> calls to the bookkeepers?

Supervisor: I think the <u>most</u> efficient approach would be for the bookkeepers to take <u>all</u> incoming calls. Since so <u>many</u> of them will be new service installations, they can complete <u>those</u> calls. They can transfer the <u>other</u> calls to regular service reps.

Designer: OK. Well, I need to get a framework or outline of the basic skill and a little bit about the Customer Service job. Also, if you don't mind, I'll tape record the conversation. It'll save us a lot of phone calls.

Supervisor: That's fine. Go ahead.

Designer: OK. To begin, help me get a big picture of the <u>entire</u> customer service job. I know you're focusing on the service installation call, but what are the <u>other</u> basic types of calls your customer service reps handle?

Supervisor: Well, there are 4 basic types. The first one is new service, which we discussed. That's 50% of the calls.

Designer: Right.

Supervisor: We also have calls where customers have questions about their bills — usually along the line of "I think you over-charged me." We get <u>lots</u> of those calls. Also, customers call if there's a problem with their service to request a repair person. And the fourth type is what we call credit calls. That's when the customer says, "I'm sorry. I won't be able to pay my bill this month." That takes a whole <u>different</u> procedure.

Designer: So you're thinking, of these four types, the most frequent one is the new service call, and that the bookkeepers would be able to handle those. That would take pressure off your reps, so they could handle the <u>other</u> ones during your busy periods.

Supervisor: Yes, exactly.

Designer: OK. Now, since bookkeepers are going to be handling <u>all</u> the calls, they'd need to <u>recognize</u> the service installation call, so they could refer the <u>other</u> ones.

Supervisor: Well, that shouldn't be a problem. When a customer calls for a service installation, they typically say something like 'I'm moving and I need to have service at my new place." So I don't think the bookkeepers would have any problem.

Designer: All right. So, they could easily distinguish the new service call from the others.

Supervisor: That's right.

Designer: Would the bookkeepers be familiar with the basic skills needed for this task?

Supervisor: Not really. See, they typically function as accountants, so they don't normally receive many calls. On occasion, they'll call a customer if there's a question about the customer's bill, so they do have some experience with the phone system. Also, they work on the same computer system although they wouldn't be familiar with all the screen formats.

Designer: So basically, they know how to use the phone and how to log on and get in and out of the computer, but they may not know the specific screens involved with this type of call.

Supervisor: That's right.

Designer: Now, to help me with the details of the service call, would you walk me through it step by step?

Supervisor: Sure. It all starts with a red light on the phone system indicating there's a call waiting.

Designer: OK.

Supervisor: At that point, the bookkeepers would press the a*vailability* button and take the phone call that's waiting.

Designer: Would a bookkeepers be familiar with the red light and the a*vailability* button?

Supervisor: Yes. It's the same system they use when there's a callback from a customer.

Designer: Great.

Supervisor: So, after pressing the red button, the bookkeepers would give the customer a service greeting — something like, "Good morning, Customer Service, Miss Jones speaking. How may I help you?"

Designer: Is it pretty standardized?

Supervisor: Yes, it is.

Designer: Great. So we have the call coming in. The bookkeepers answers the phone, giving the greeting, and the customer says something like, "I'm moving. I really need my service installed."

Supervisor: Exactly.

Designer: Now we're ready to take the order.

Supervisor: Right. Now we start the order entry process on the computer, so let me get on the system. That way, you can look over my shoulder, and you can watch as I'm taking an order.

Pause

Supervisor: OK. I've logged into the customer service system and have a main menu with the types of calls on it.

Designer: Great. So, if the call coming in is a service installation, it looks like we start by selecting the new service option.

Supervisor: That's exactly what we do. [She clicks New Service button.]

Designer: What if the call isn't for new service? What should the bookkeepers do?

Supervisor: We'd need some sort of standardized response. At this point, the bookkeepers could say something like, "Please hold for just a moment. I'll transfer you to one of our customer service specialists." Like I said, they already know how to transfer calls.

Designer: So basically, they'll select the new service option. Otherwise, they'll transfer the call to one of the other reps.

Supervisor: That's right. So – now we want to get the customer demographic information.

Pause

Supervisor: OK, we've collected and entered the customer background information and the installation date. The next section involves credit establishment.

Designer: I see.

Supervisor: If the customer can meet **one of 3** criteria for credit, they don't need to pay the deposit. If they <u>can't</u> meet one of the three, then they're asked to make a $100 deposit before they can get service.

Designer: That's a lot of money.

Supervisor: It is. But as a company, we have so many write–offs because customers move away and don't pay us that we've needed to become more strict. Anyway, here's what we do next. [Click Credit button on Customer Information window.] We click on credit and move to the credit establishment screen where we can see the three criteria. We'd want to ask questions about <u>each</u> of them.

Designer: OK.

Supervisor: The first criteria is prior service. At that point, we ask the customer, "Have you had service with us in your name during the past 3 years?" And, what we're looking for is whether they've had service with us for <u>one or more</u> years during the past 3 years. And they need to have a <u>good payment record</u>.

Designer: OK. So, you'd click "yes" if they've had service within the last 3 years. [Click Yes or No.]

Supervisor: Right.

Designer: How would you know if they've had a good payment record?

Supervisor: That's where we use the payment history window.

Designer: I knew this wasn't gonna be that easy!

Supervisor: No. This is probably the most complicated part. I think it'll take a lot of the training time. Especially on how to do all this diplomatically. All right, let's see. From the credit screen, we click on Go To and the payment history window appears. [Click Go To.] The system verifies the social security number on this window with the one that the customer gave us previously. If there's a mismatch, a warning notice appears. But let's assume we have a match. Now, notice in this example, we have a Margaret Jones… and her social security number. Then we have several codes after each of the payment months.

Designer: Actually, this looks a little confusing. What's *PIF*?

Supervisor: *PIF* would be "paid in full." *PP* would be "partial payment."

Designer: Partial payment. OK.

Supervisor: Can you guess what *OD* is?

Designer: Let's see. Do you send out overdue notices?

Supervisor: That's it! Now let me explain the whole billing process to put this more in context. First, we send a bill to the customer.

Designer: All right.

Supervisor: 14 days after the payment's due, if we haven't received it, we send an overdue notice.

Designer: OK.

Supervisor: 14 days after that, we send a warning notice stating that their services will be discontinued unless they make a payment.

Designer: So really, it's almost 2 months later before you send that warning notice.

Supervisor: We give them quite a bit of time to make the payment. But sometimes, we still get to the point where there's a disconnection.

Designer: I'm sure that's true.

Supervisor: So, the *OD* stands for the overdue notice that occurs 14 days after the initial bill.

Designer: OK.

Supervisor: But what we have here is <u>another</u> *OD* plus a *W*.

Designer: That must stand for the "Warning Notice."

Supervisor: Yes, exactly. So, that's an overdue followed by a warning. Notice that the warning is emphasized by these 2 bullets on the side, so you really focus on it. That's because this warning notice determines whether the customer has a good payment record. And the way we establish that is by allowing them <u>one</u> warning notice during the year.

Designer: OK.

Supervisor: But, if they have **2 or more** warning notices, we consider that a bad payment record. Then they can't establish credit this way.

Designer: OK. So, when we look at this window, we quickly scan for bullets, and, if there's more than one set, we know this is a bad payment record.

Supervisor: Exactly. In this case, how many sets of bullets do you see?

Designer: 2, so, this customer would have a <u>bad</u> payment record and wouldn't qualify for this criteria.

Supervisor: Absolutely.

Designer: So we'd probably select bad. [Select Credit Rating.]

Supervisor: Right. And your selection will also be recorded back on the credit screen. [Click Close.] See, here it is. Now, the second criteria is whether the customer owns the installation residence. If payments aren't made, this insures us of some collateral for collection purposes. [If owns residence, click Owner Occupied checkbox.]

The third criteria is their employment. We want to know if the customer has been continuously employed at the same place for a year or more. [If employed more than one year, click 1 Year+ Employment checkbox. Complete employment information.]

Designer: One quick question. Let's say they had a bad record. But, when you got here, you found that the customer owned the residence. Would you stop at that point?

Supervisor: No. We like to get all this information for our records. Then our experts can decide which of these criteria is best for determining whether customers are likely to pay.

Designer: So, even if they have prior service with a good payment history, we still get all this information.

Supervisor: Yes, because that's the basis for any changes in our credit policy. OK. To get the employment information, we first enter the company name — IBM, for example. Then we need an employment reference to verify length of employment in months and years.

Designer: I see.

Supervisor: Throughout this process, we're determining whether a deposit will be requested. If they meet any one of these criteria, then we're finished with the process. If not, we indicate "deposit request made" by selecting yes. [If deposit is required, click Deposit Request Yes checkbox.] Then we can go to a window that lets us indicate how the customer will pay the deposit.

One last point — before terminating the call, it's a good idea to verify the main points with the customer, including the service installation address, the turn-on dates, and the deposit arrangement.

Designer: Okay, thank you. We'll put together a draft course outline and plan on meeting again next week. Meanwhile, I'll be in touch if any questions come up.

CUSTOMER SERVICE SYSTEM
Main Menu

New Service	Credit
Trouble	Billing

Close

Exit

Customer Information

Credit | Main Menu

Social Security Number	123-45-6789
Customer Name	Margaret Jones
Address	123 Elm Street
Zip:	19220
City, State	York, PA
Previous address	538 Ash Avenue
Previous Phone	223-3344
Years at this address	1
Installation Date	9/2/96

Credit Information

Main Menu

Name: Margaret Jones

Social Security #: 123-45-6789

1 Year+ Service: Yes ☑ | GoTo | **Show Payment History**

Owner Occupied Yes ☐   Good ☐

1 Year+ Employment Yes ☑   Bad ☑

Company: IBM

Reference Name John Richards

Reference Phone 256-7756

Length of Time 2 Yrs 4 Mo

Deposit Request: Yes ☐ | GoTo | **Deposit Request**

Payment History

Close

Customer Name Margaret Jones

Social Security Number 123-45-6789

Previous Payment History:

Previous Month	PIF	○ ○	7 Months Out	OD	○ ○
2 Months Out	ODW	◉ ◉	8 Months Out	PP	○ ○
3 Months Out	OD	○ ○	9 Months Out	PP	○ ○
4 Months Out	PP	○ ○	10 Months Out	PIF	○ ○
5 Months Out	PIF	○ ○	11 Months Out	PIF	○ ○
6 Months Out	ODW	◉ ◉	12 Months Out	PIF	○ ○

Credit Rating [Bad ▾]