

Virtual Environment Opportunities

The Potential for Organizational Value Using Virtual Teams in the Call Center

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LEAD638 Leading in a Virtual Environment

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With the advent of technologies such as email, instant messaging, video conferencing, intranets, and high speed Internet connections becoming commonplace, opportunities abound for considering teaming arrangements previously dismissed as ineffective or too costly. It is now conceivable and practical for work teams to interact effectively across time and distance to accomplish group work goals while allowing individuals to work within their time-location constraints and preferences.

In a large metropolitan area it is not uncommon for workers to spend an hour or more commuting one way to the workplace. Increasingly, both spouses in a family are employed putting a strain on schedules, child care needs, and family life. Global companies such as Hewlett-Packard, Motorola, Bank of Boston, and Steelcase are using virtual teams as tools that enable groups of individuals spread across geographic distances to work together (Lipnack & Stamps, 1997).

Given these trends and successful use by other companies, are there opportunities to exploit these emerging technologies and teaming arrangements in a call center environment?

Agenda

1. What is the purpose of this presentation?
2. What is a virtual environment?
3. What are the opportunities?
4. What are the risks?
5. What conclusions can we draw?
6. What are the next steps?

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Let's review the agenda. First, we'll discuss the purpose of this presentation.

Second, we'll explore the nature of virtual teams and a virtual environment. We'll consider the latest thinking about virtual teams and apply the concepts to our call center environment.

Third, we'll identify opportunities for using a virtual environment and related technologies and consider how they might apply to our call center.

Fourth, we'll identify special considerations and drawbacks of a virtual environment in a call center.

And last, we'll draw appropriate conclusions and consider possible next steps.

Purpose

- Explore the notion of a virtual environment
 - Inform
 - Dialog
- Consider application to the call center
 - Teams and team leadership
 - Technology

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The intended audience for this presentation is leadership and upper management in the customer service organization and call center operations. Eventually, middle level management and team leadership may also need to receive this information.

Call center operations consists of a single facility currently with 300 customer representative (CR) seats answering customer phone calls dealing with billing and service issues. The call center operates a main shift from 8am to 6pm six days a week with staffing of 8 to 12 CRs the remaining hours seven days per week. The call volume last year was approximately 1.5 million calls.

First, we'll explore the nature of virtual environments by providing an overview of key concepts and engage in a dialog about them.

Then, we'll look at how these ideas apply to a call center environment in terms of people, teams and team leadership, and technology.

Virtual Environment Factors

- Globalization
- Inter organization collaboration
- Technology
 - Internet
 - High speed broadband connections
 - Software tools

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Economic globalization is a process whereby the marketplaces of countries around the world become increasingly interdependent through trading of goods and services, flow of capital, and technological change (Shangquan, 2000). This trend is continuing to accelerate and is expected to be increasingly powerful (*Global Trends*, 2000).

As organizations work with one another across distances and time zones, this creates a “virtual” environment in which work occurs. As organizations trade with each other and form alliances to work together, they often form virtual teams to accomplish interdependent tasks.

Technology is an enabling factor that allows people and teams to work in a virtual environment. With the globalization of the internet and e-business with increasingly widespread adoption of its use, the internet and related technologies provide the basis for the communication necessary for effective collaboration in a virtual environment.

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Work Group Vs Team

- Team: a group focused on tasks
- Four criteria for a group to be a Team
 - Joint mission
 - Interdependent team members
 - Committed to working together
 - Accountable to a larger organization
- Traditional team: same organization, same time, same place

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Adapted from Hoefling (2003)

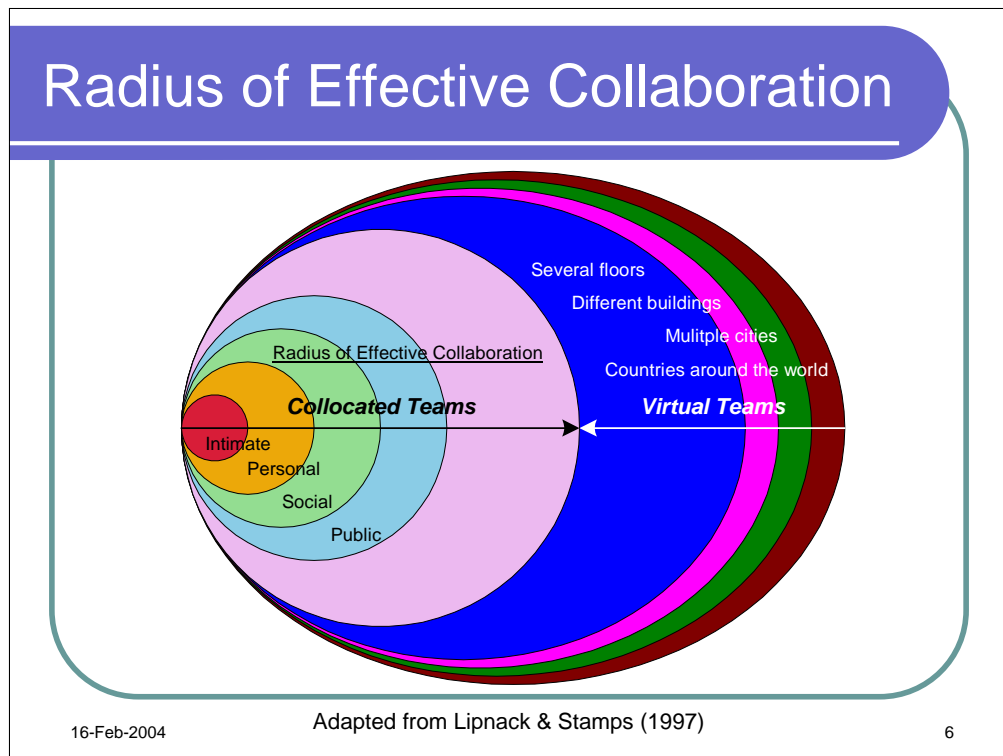
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What distinguishes a team from any other small group of people (such as families and social groups)? According to Lipnack & Stamps (1997): "orientation to task" (p. 41). Katzenbach and Smith define a team as "a small number of people with complementary skills who are equally committed to a common purpose, goals, and working approach for which they hold themselves mutually accountable" (as cited in *Teams*, n.d.). Avery (2001) puts it this way: "The task is the reason for the team" (p. 13).

Hoefling (2003) makes a useful distinction between a work group and a team asserting that four criteria must be met before a work group can be considered a team:

1. Joint mission. The group must have a shared vision for what is to be accomplished. The group must share joint responsibility for the outcome of the endeavor. "Can more than one person cooperating together do the work better?" (Hoefling, 2003, p. 5).
2. Interdependent team members. The group members must be mutually dependent upon one another and must work together to achieve success. That is, one team member cannot make the team successful and a team member cannot be successful if the team is not successful. "Are the members naturally interdependent?" (Hoefling, 2003, p. 5).
3. Committed to working together. Members of the group must be willing to work together toward the success of the team. Any unwillingness to work together implies that a commitment must first be made in order to be a team. "Is the final output a combination of group and individual contributions?" (Hoefling, 2003, p. 5).
4. Accountable to a larger organization. Individual group members can only be rewarded as successful if the team as a whole succeeds. Individuals cannot be rewarded while the team is less than successful. "Can results and/or evaluation be group driven?" (Hoefling, 2003, p. 5).

A traditional team is a group of people belonging to the same organization working in the same physical place at the same time and is often referred to as a collocated team (Lipnack & Stamps, 1997).



Research conducted over several decades suggests that the distance within which people can effectively collaborate (“the radius of effective collaboration”) is very small (Lipnack & Stamp, 1997). Lipnack & Stamp (1997) suggest that the nature of collaboration changes with the distance between individuals: intimate (0 – 18 inches), personal (18 inches – 4 feet), social (4 feet – 12 feet), public (12 feet – 25 feet) with a maximum distance of effective collaboration at 50 feet.

Today, it is not unusual for even a team located in the same facility to work more than 50 feet apart from one another. Such a team may be located in different parts of a floor, different floors within a building, or even different buildings.

As team members get increasingly farther apart, then time begins to become a factor as multiple time zones are spanned (Lipnack & Stamp, 1997). Organizational collaboration between and within companies with global operations increasingly require people dispersed over wide geographic areas and different time zones to work as teams.

Virtual Team

Team interactions...

- Communicating
- Interacting
- Relationship forming

...that span boundaries

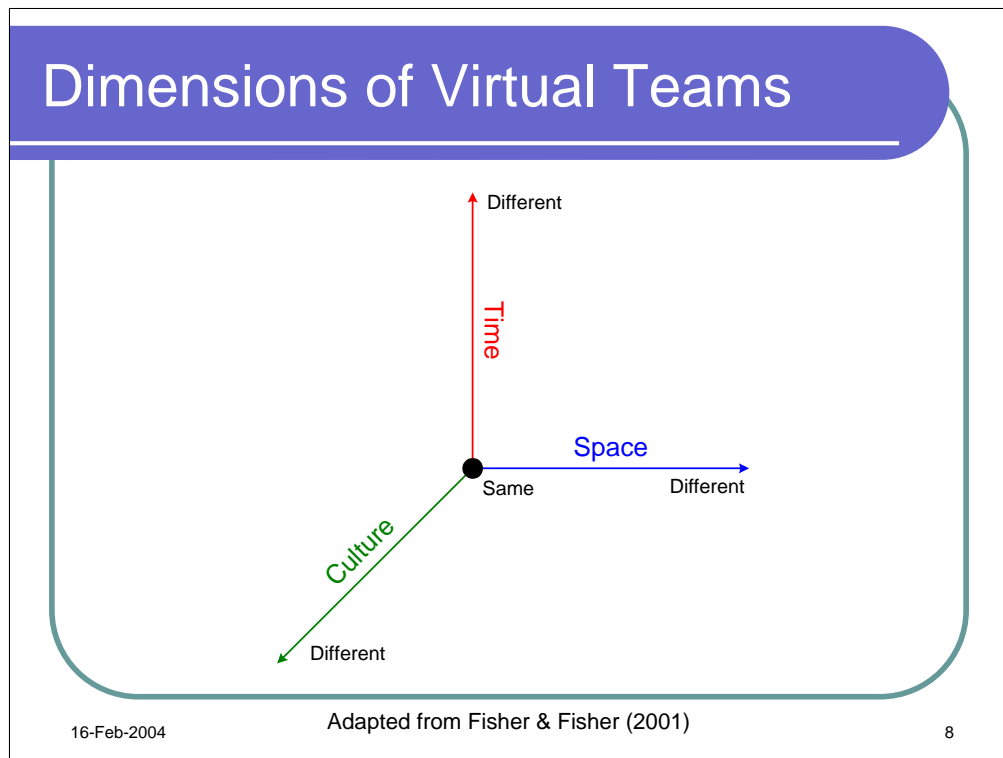
- Space
- Time
- Organization

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Lipnack & Stamps (1997) describe the essential difference between a traditional team and a virtual team as being the boundary crossing nature of the group's communication, personal relationships, and other interactions. A virtual team typically spans geographic space, time, and/or organizational boundaries (Fisher & Fisher, 2001).

Lipnack & Stamps (1997) generalize space and time into a single dimension. That is, space and time are directly related to one another because spanning geographical distance also spans time zones. At short distances (within the same time zone), the time differential is not significant relevant to the ability of a team to work together simultaneously.



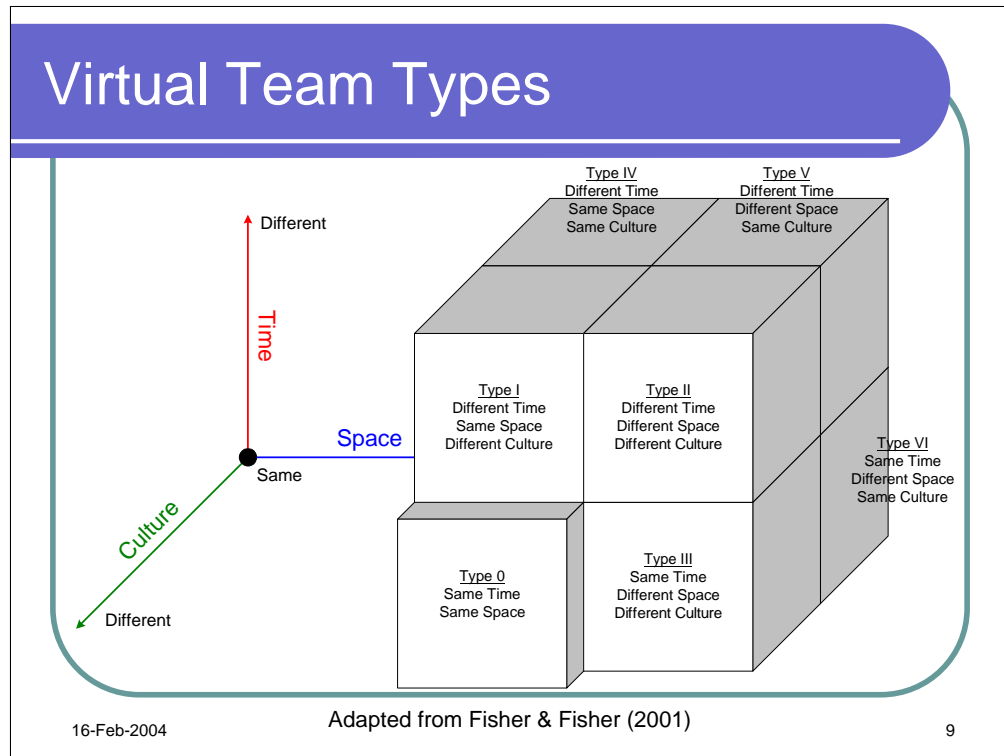
Fisher & Fisher (2001) propose a three dimensional model of virtual team types. Each dimension of time, space, and culture potentially creates distance between team members. The model shows a continuum on each of three axes that range from same to different and is useful to illustrate the possible interrelationships between the three factors of time, space, and culture.

Fisher & Fisher (2001) suggest that culture is a more meaningful distinction than organization since multiple cultures can exist in a single organization. Schein (as cited by Fisher & Fisher, 2001) defines culture as anything that can be attributed to “learned behavior about how to work together.” This would include not only differences between countries or ethnic background but socialization, technical discipline, or other organizational norms.

The X axis represents differences in space due to geographic dispersion.

The Y axis represents differences in time due to team members working different shifts or in different time zones.

The Z axis represents differences in culture due to norms or ways of working.



Fisher & Fisher (2001) suggest that six meaningful distinctions of virtual team types can be derived from the three axes of time, space, and culture.

Of the eight possible combinations of time, space, and culture, two of the combinations (same time, same space, and same culture; same time, same space, different culture) are not virtual teams since by definition they are collocated and work at the same time.

The remaining six combinations form team types that are useful for understanding virtual team characteristics and the unique challenges for each.

Virtual Team Types I – III

Type	Attributes	Example	Interaction Challenges
I	Different time Same space Different culture	24x7 operation (warehouse, factory, customer service)	Cross shift Multicultural
II	Different time Different space Different culture	Global teams Large projects Large organizations	Cross time zone Multiple location Multicultural
III	Same time Different space Different culture	Local sales team Regional services	Cross geography Multicultural

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Adapted from Fisher & Fisher (2001)

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A Type I team is an around the clock or multiple shift operation that uses the same facilities or equipment for each shift. Since Type I teams occupy the same space, simple communication mechanisms like bulletin boards, white boards, or charts can be used to communicate effectively from one shift to another. Additionally, shifts can overlap to provide some face-to-face time between team members working different shifts.

A Type II team is a large team that exists in different locations in different time zones with different ways of doing things. Asynchronous communication mechanisms like email, voice mail, discussion groups, and web sites are important to facilitate team communication spanning time and distance. Face-to-face time becomes a challenge because of the logistical difficulties in getting everyone together at the same time. The team can use technologies such as telephone conferencing and video conferencing to compensate but are still faced with time zone issues that limit face-to-face time amongst the entire team.

A Type III team is a team spread out in different locations but within the same or adjacent time zones. Team communication obstacles are reduced when team members work at or near the same time, but there are still challenges as face-to-face time requires travel to a common location. Real time technologies like telephone conferencing and video conferencing are effective in getting the entire team together at the same time.

Virtual Team Types IV – VI

Type	Attributes	Example	Interaction Challenges
IV	Different time Same space Same culture	24x7 operation (warehouse, factory, customer service)	Cross shift
V	Different time Different space Same culture	Global teams Large projects Large organizations	Cross time zone Multiple location
VI	Same time Different space Same culture	Local sales team Regional services	Cross geography

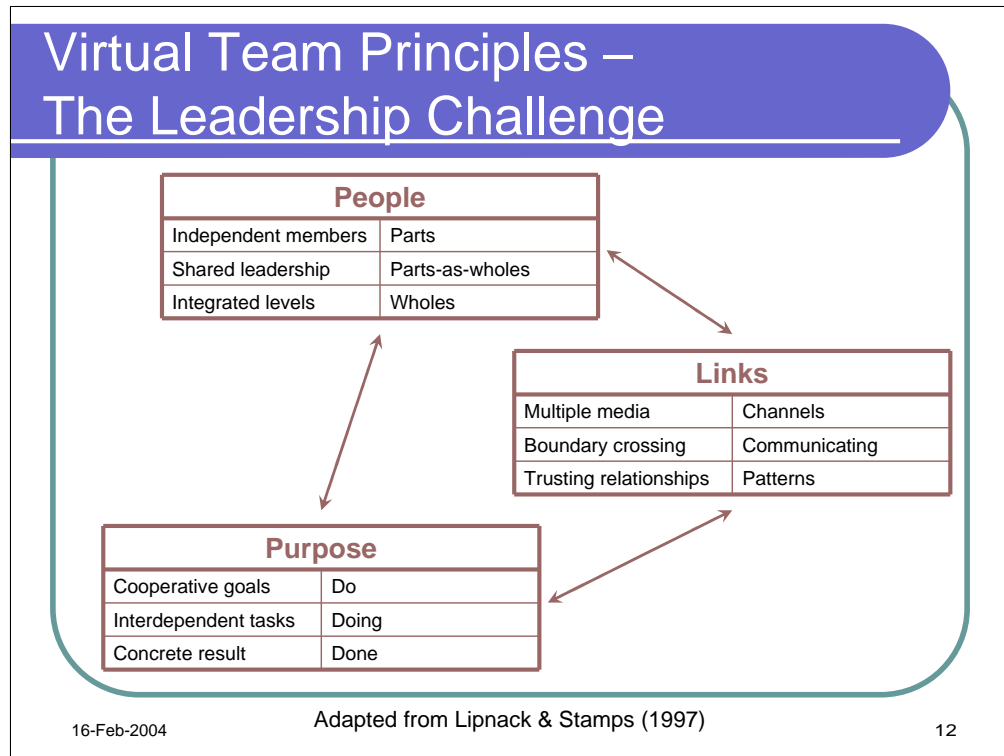
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Adapted from Fisher & Fisher (2001)

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The difference between a Type I and Type IV team is on the culture dimension. A Type I team has different ways of working (heterogeneous) while a Type IV team has the same ways of working (homogeneous).

Similarly, the differences between Type II and Type V (as well as Type III and Type VI) teams are also due to culture differences with the former team type being heterogeneous and the latter team type being homogeneous.



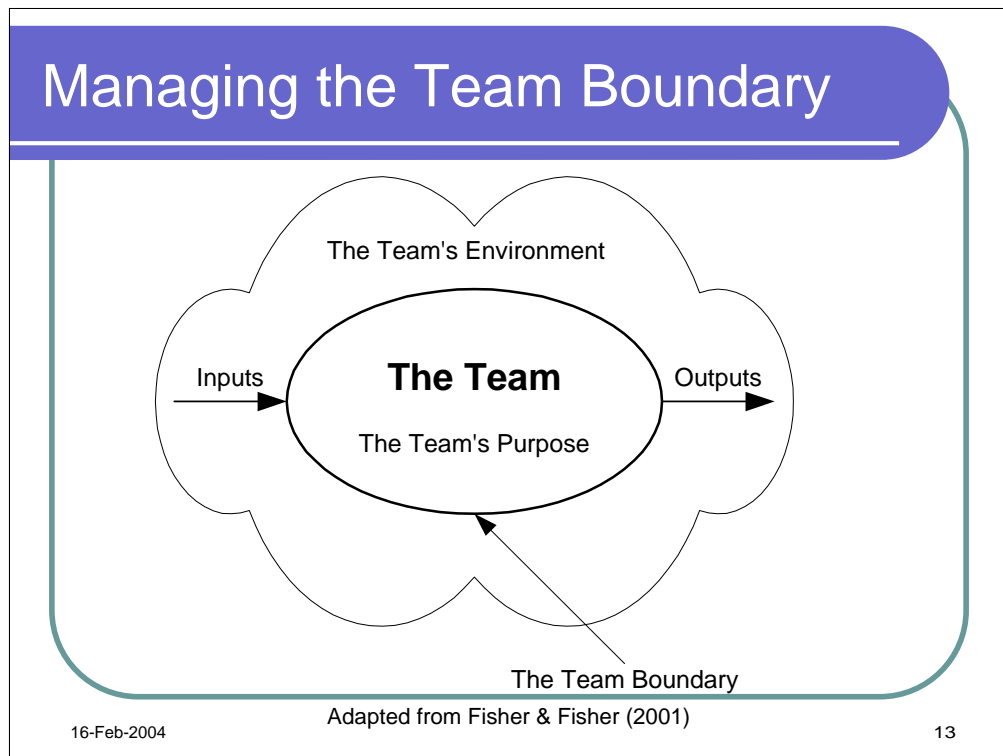
Lipnack & Stamps (1997) describe success factors for a virtual team in terms of a three way relationship between people, purpose, and links.

People make up virtual teams. People in virtual teams work independently, yet most team members must at some point participate in the leadership process within the team at large or within team subgroups. Shared leadership is necessary to integrate the task results of the individual team members into the task results of the team as a whole.

Purpose is the force that drives teams and the interdependence that must be present in successful teamwork. This is extremely critical for virtual teams because they operate without the normal routines and disciplines associated with traditional teams. Cooperative goals give rise to interdependent tasks, and interdependent tasks culminate in concrete results. Clear purpose gives focuses the team on being productive to achieve its aim.

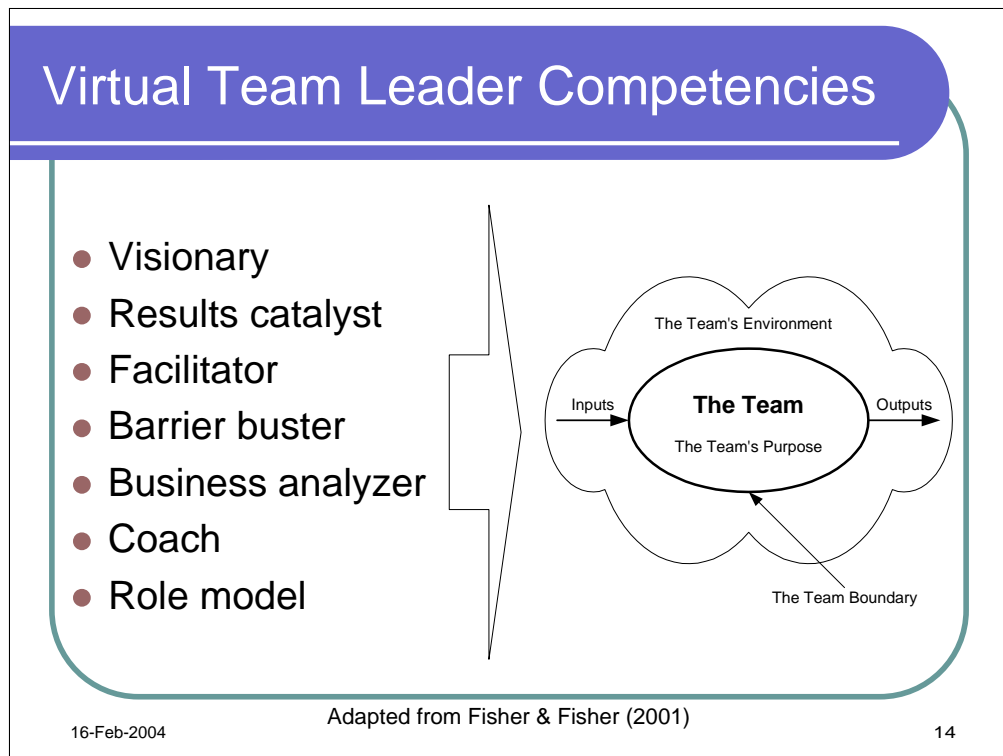
Explicit links between team members are the distinctive feature of virtual teams. Traditional teams communicate inherently and naturally as they work side by side, but virtual teams must be continually deliberate about their communication mechanisms. The foundation is the physical technology that provide multiple tools and networks of connections necessary for communication to take place. This enables communication across the boundaries of time and space that separate virtual team members. Obstacles present in any traditional team regarding trust and positive relations between team members that is so necessary for productive work are compounded with virtual teams. Virtual teams must establish patterns of behavioral interaction that promote such trust and must establish effective mechanisms to effectively detect and deal with misunderstandings and conflict.

These principles of virtual teamwork represent the challenges about which team leaders must gain insight, proactively plan for, and manage throughout the life of the team.



Fisher and Fisher (2001) describe a team and its environment in terms of the team's purpose, the team's environment, and boundary between the two. The team manages all things inside the team boundary. This is where the work of transforming inputs into value-added outputs gets done. The team's environment is all things outside the team itself. The team boundary represents the interface with the team's environment.

Traditional supervision and team leadership is concerned with managing and optimizing the transformation work that is inside the team boundary and the primary concern of the team. The leader of a virtual team is concerned about the processes going on within the team, but teaches the team how to manage its own processes while focusing primarily on managing the boundaries or interfaces with the team's environment. These boundary tasks include insulating the team from environmental pressure, bringing in relevant information including training for the team, filtering out distractions, developing alliances and other appropriate links with outside concerns, acquiring resources, and generally solving problems and eliminating obstacles in the environment.



Fisher and Fisher (2001) also describe seven leadership competencies for organizational leadership and find that they similarly apply to virtual team leadership (but not always to traditional supervision).

- Visionary. Similar to executive and other organizational leaders, a virtual team leader must develop vision for the team that clarifies their purpose and compels them to pursue it. Clarity of purpose is essential to span the time and distance barriers of the virtual team so as to keep them on track toward achieving their goals.
- Results catalyst. A virtual team leader “helps the team improve performance, gets results without resorting to authoritarian methods, manages by principle rather than by policy, and uses boundaries rather than directives” (Fisher & Fisher, 2001, p. 11).
- Facilitator. A virtual team leader acquires and places at the team’s disposal the information, tools, and other resources necessary for success as well as acts as a facilitator for the interaction of the group.
- Barrier buster. A virtual team leader eliminates obstacles that impede the team, insulates them from distractions in the environment as well as challenges established routine and help the team to accomplish breakthroughs instead of incremental improvement.
- Business analyzer. A virtual team leader understands the big picture and translates it into terms that are meaningful to the team and their task at hand as well as acting as the mediator between the team and its customer.
- Coach. A virtual team leader acts as teacher and mentor to team members helping to achieve their potential as well as holding the team accountable to their commitments.
- Role model. A virtual team leader demonstrates the behaviors necessary on the part of the team and other leaders to establish trust, resolve interpersonal conflict, and adhere to team operating agreements.

Virtual Team Leader Behaviors

- Communication
- Conflict resolution
- Feedback
- Motivation

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Communication, conflict resolution, feedback, and motivation are all key concerns for virtual team leaders.

The previous descriptions of virtual team leader responsibilities and behavior all point to effective communication ability to be successful. In the People-Links-Purpose model, it is the virtual team leader that establishes and nurtures the links that enable team members to communicate with one another. It is the virtual team leader that communicates and ensures understanding of team purpose. In the team environment boundary model, it is the virtual team leader that manages the communications that cross the team boundary, provides information to the team, and challenges the team to manage their own processes. In the seven competencies model, effective communications on the part of the virtual team leader enables all seven of the competency behaviors. Grenier and Metes (1995) state:

Communication is the life force of the virtual initiatives; work and learning depend on communication. With good communications, you can develop or find most of the competencies you need; without a strong virtual communication infrastructure, little will be accomplished. ... When in doubt, communicate. (p. 58)

Since team members do not frequently interact face to face in a virtual team, it is easy for miscommunication to occur mistrust to go unnoticed, unaddressed, and unresolved (Hoefling, 2003). When this occurs, conflict can become a big issue. Virtual team leaders must be sensitive to detect conflict, and resolve it immediately to avoid problems.

It is important for a virtual team leader to deliver appropriate feedback to the team. Fisher and Fisher (2001) identify feedback on performance as an expectation of virtual team members, but it must be skillfully delivered as feedback rather than advice.

People are motivated primarily by a desire to excel (Fisher & Fisher, 2001). The culmination of effective leadership is establishing a team environment and culture that enables team members to do just that.

Types of Communication Tools

- Synchronous vs asynchronous
- Information exchange strategies
 - Push
 - Pull
 - Post
 - Publish/subscribe
- Information tools vs relationship tools
- System wide tools vs intra team tools

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There are several aspects to communication technologies that facilitate collaboration in a virtual environment. A virtual team can apply the most appropriate technologies and strategies to meet specific communication needs.

Synchronous communication requires that all parties are present to interact in real time and asynchronous communication is when parties interact at different times (*Asynchronous/ Synchronous*, n.d.). Familiar examples are a telephone conference for synchronous communication and email for asynchronous communication.

There are several information exchange strategies available for the communication of information in a virtual environment:

- Push refers to an originator of information actively sending it to another known to have need. An email message sent to an individual or is a good example of the push strategy.
- Pull refers to one in need of information polling others to get needed it. Making a specific request by telephone or email for information is an example of the pull strategy.
- Post refers to an originator of information making it generally available and persistent in case others may need it at a later point in time. Putting information on a website or in a threaded discussion group is a good example of the post strategy.
- Publish/subscribe is a variation of post and pull strategies where an originator of information makes it generally available (posts it) and an interested party signs up in advance to receive that type of information (pulls it). A listserv is an example of the publish/subscribe strategy. Synchronization tools and notification services for changing websites are also examples.

Information tools enable knowledge sharing and are easy to implement, learn, and use. Relationship tools support personal interaction as team members work on interdependent tasks (Hoefling, 2003).

System wide tools support interaction and information exchange with the organization or world outside the team while intra team tools are used primarily for information exchange and personal interaction within the team (Hoefling, 2003).

Communication Tools (1)

Tool	Sync/ Async	Exchange Strategy	Inform/ Relate	System/ Team
Telephone, Cell Phone	Sync	Push, Pull	Inform, Relate	Team
Voice Mail	Async	Push, Pull	Inform	Team
Video Conference, Telephone Conference	Sync	Push, Pull	Inform, Relate	Team
Instant Messaging, Chat Room, Moo	Sync	Push, Pull	Inform, Relate	Team
NetMeeting, Webinar, Virtual Whiteboards	Sync	Push, Pull	Inform, Relate	Team

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This table shows various communications tools that a virtual team can use and classifies them according to their primary role in the types previously described. Let's discuss a few of them that may be unfamiliar.

Examples of instant messaging are AOL Instant Messenger, Windows Messenger, and Yahoo Messenger. A moo is a combination of a chat room with simulation and other special interaction mechanisms.

A virtual whiteboard is a drawing or writing surface that participants can use and view during a virtual meeting. A virtual whiteboard can be only on participants' personal computers or may be a physical whiteboard that is also viewable on participants' personal computers over the internet or an intranet.

NetMeeting is a Microsoft software product that enables real time interaction between multiple individuals from their personal computers over the internet or an intranet. Features include instant messaging, notification when a person comes online, virtual whiteboard as well as viewing and sharing one's personal computer desktop.

A webinar is similar to NetMeeting except it is an internet based meeting during which participants view a common website and typically interact simultaneously on a telephone conference call.

Communication Tools (2)

Tool	Sync/ Async	Exchange Strategy	Inform/ Relate	System/ Team
Email, Pager, Delayed Messaging	Async	Push, Pull	Inform	System, Team
Bulletin Board, Discussion Groups	Async	Post, Push, Pull	Inform	System, Team
Listservs, Newsletters	Async	Publish/ Subscribe	Inform	System, Team
Document Repositories	Async	Post	Inform	Team
Website, Wiki	Async	Post	Inform	Team

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Delayed messaging is a feature of some instant messaging tools that stores a message until the designated recipient comes online.

A wiki is a special type of website that provides tools that enable its users to easily and organically maintain website content for the benefit of the community.

Comments and observations:

- Tools that are effective in enabling interpersonal relations are primarily synchronous. Although interpersonal relations are possible using asynchronous communication tools like email, it's difficult to make them warm and friendly while often requiring special care not to be inadvertently cold and harsh.
- Although it's possible to post information at a group meeting such as a telephone conference or a video conference, generally this occurs verbally and is usually transient in that the information does not persist when the meeting terminates.
- Some tools enable both information sharing and interpersonal relationships, but there are no tools that seem to be exclusively for interpersonal relations.
- Some tools classified as primarily intra team tools could also be used to communicate outside the team as well.

Call Center Team Type

- Team size: 9 – 11 customer representatives (CRs) with leader
- Type 0
 - Same shift
 - Collocated (proximity: within 50 feet)
- Type IV during emergencies
 - Teams span work shifts
 - Simple communication mechanisms: whiteboard, scrolling sign, team notes

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We now shift the focus of the discussion from the characteristics of the virtual team and the virtual environment to application of the characteristics to the call center environment.

The current team structure in the call center consists of a team leader and nine to eleven customer representatives team members. This team is collocated, works the same shift, and has a common way of doing work.

Although there are multiple shifts that use the same facilities and equipment, there is normally minimal if any interaction between shifts. We classify this as a Type 0 team operation (same time, same space).

In special circumstances (such as a storm emergency or catastrophic power outage), call center operations may revert to a Type IV team operation as teams span shifts. In this situation, shift-to-shift communications become important as a team needs to coordinate their efforts to provide the best quality service to customers. Simple communication mechanisms like whiteboards, scrolling electronic signs, and informal notes or emails exchanged between team leaders and team members work effectively.

CR Teams: Primarily Work Groups

Criteria	Meets
Joint mission	Yes
Interdependent	No
Work together	Some
Accountable as a whole	No

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A work group can be virtual, but it's important to understand the differences between a work group and a team because the challenges associated with a virtual team are much greater than those associated with a virtual work group.

According to Hoefling's (2003) definition of a work group versus a team, the characteristics of the call center CR team is really more of a work group than a team because the degree of cooperation required between group members does not contribute to the success of the group as a whole. Therefore, there is low interdependence between team members. Also, an individual customer representative is rewarded according to their own performance rather than the performance of the team as a whole.

Opportunity: Reduce Costs

- **Direct cost savings**
 - Eliminate CR call center workstations
 - Lower computer workstation costs
 - Lower benefit costs through part time CRs
 - Reduce training costs through less turnover/improved retention
- **Overhead reduction**
 - Reduce call center floor space
 - Reduce call center utilities

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The opportunity to consider is the formation and deployment of virtual customer representative teams out of the call center to work in their own home offices. The use of virtual CR teams provides real potential for significant qualitative and quantitative benefits.

Moving toward virtual CR teams reduces costs in these areas:

- Fewer CRs in the call center means fewer workstations. Regardless of whether CR headcount remains steady or continues to grow, some costs for new and replacement furniture and equipment costs for CR workstations can be reduced or eliminated.
- In conjunction with moving CRs out of the call center, deployment of thin client computing devices for new and replacement computer workstations also provides potential cost savings for equipment and its administration.
- Virtual CR teams provide the opportunity to consider part time CRs which would lower benefit costs by reducing the need for a full benefit package for CR employees.
- A reduction in benefit costs could allow a slight pay increase while working from home could be an attractive benefit. This could lead to lower CR turnover and therefore reduce training costs.
- Fewer CRs in the call center means less floor space and lower facility overhead costs. Since the call center is currently at or near physical floor space capacity, lowering CR headcount eliminates potential facility expansion costs or lowers floor space cost by making floor space available for other use by the company. This also reduces facility overhead costs such as lighting, heating, air conditioning, cleaning, and maintenance costs.

Opportunity: Improve Quality

- Changing mix of qualifications and amenities attracts more candidates
 - Those currently not in workforce
 - Higher education
 - Part time availability
 - More flexible hours
 - Wider geographic area
 - Lower commuting time and costs

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Quality customer service is a perennial concern and a continual challenge to improve and maintain. The quality of service to our customers can improve through attracting and retaining better qualified people to handle customer calls. Offering the opportunity to work at home is a significant change that could dramatically change the composition of the pool of people in the market for employment at the company as a customer representative.

This could attract better educated people currently not in the workforce due to constraints and choices around home and family life. Part time work and flexible work hours is potentially attractive to many who are in this situation.

Additionally, we can appeal to people in a wider geographic area because the length of commuting time to the call center is no longer relevant. The accompanying reduction in commuting costs as well as the potential for reduced child care costs may also increase the size and change the composition of the workforce pool.

Storm and power outage emergencies often require additional staffing. Virtual CRs could easily augment staffing thus improving customer service when we need it most.

Quantitative Value

Item	Cost Factors	Cost
Workstation furniture & equipment	\$5000 each	\$5,000 per CR
Floor space	6x8 = 48 sq feet \$20 per sq foot \$960 per month	\$11,520 per CR per year
Utilities and maintenance	10% of floor space cost	\$1,152 per CR per year
Computer	Half of current cost \$600	\$300 per CR
New CR Training	Turnover 50% / 150 per year 40 hours @ \$35 blended rate	\$210,000 per year

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Here are some approximate numbers around the CR call center costs. A new or replacement CR workstation amounts to a total cost of around \$18,000. Currently, we spend about \$210,000 per year training new CRs.

It's difficult to project the kind of savings that could be realized on an annual basis since this approach is at an exploratory stage, but this table shows the kind of potential real cost savings. Given the current CR population of about 300, moving 20% of the CRs out of the call center next year would amount to savings of about \$1,000,000 (18,000 x 60) and \$760,000 (12,672 x 60) each subsequent year. Reducing CR turnover to 30% would amount to savings of about \$126,000 (300 x .3 x 40 x 35) per year.

Call Center Impact

- CR team characteristics
- Team leadership
- Training for virtual teams
- Information system and telephony technology
- Communication tools

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Moving to virtual CR teams has potentially wide ranging impact on the call center operations. The effects include but are not limited to changes regarding the characteristics of the CR team, the requirements for effective team leadership, the CR recruiting and training requirements, the types of communication tools necessary to be effective, the methods for monitoring CR performance, and the technology to meet information system and telephony needs.

Let's look at each of these impacts.

CR Virtual Team Type

- Move CRs out of the call center
 - Virtual CRs
 - Virtual call center
- Type VI
 - Same time
 - Different space
- Increase collaboration and interdependence

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Moving to virtual CR teams changes the characteristics of the CR team primarily because a single team would be distributed across multiple locations as each CR would be working in their own home office. Using the virtual team type model of Fisher & Fisher (2001), this changes from a Type 0 (non-virtual team: same time, same location) to a Type VI (same time, different location). For storm or outage emergencies, the team type changes from a Type IV (different time, same location) to a Type V (different time, different location).

The biggest opportunity for improving performance by changing to virtual CRs teams is the transition from a work group to a team where CR team members are working interdependently. This is a big challenge as handling a customer phone call is in itself an individual task not very conducive to teamwork. Additionally, it is not acceptable for the performance of the team as a whole to decline with regard to the combination of total call handling throughput and call quality.

One approach to increase teamwork and interdependence among CR team members is to reward the team as a whole for their effectiveness and efficiency in handling customer calls rather than rewarding individual CR performance. Using Hoefling's (2003) team criteria, this would require the team leader to instill a sense of joint mission to become effective as a team in customer call handling, to build a sense of interdependence and commitment as a team toward the common task of the team. Additionally, the reward and recognition system needs to change from measuring and rewarding individual performance to a focus on team performance.

Making these changes raises performance expectations and requires new skills for the virtual team leader.

Virtual CR Team Leadership

- Develop virtual leader competencies
 - Leadership training
 - Coaching and mentoring
- Recruit experienced leaders
- Acquire other resources
 - Books and periodicals
 - Conferences
- Create community of virtual team leaders

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A big challenge is to grow virtual team leaders. Most current CR team leaders have demonstrated leadership talent but their skills require augmentation to be successful virtual team leaders. This requires investment in training to acquire necessary skills. "A formal leadership training program is essential for any organization transitioning to virtual operations" (Greiner & Metes, 1995, p. 85). Additionally, coaching and mentoring is likely to be needed to follow up on formal training.

Another option would be to recruit experienced team leaders from within and outside the company.

Consideration of investment in other resources such as certification, publications, conferences, and seminars is warranted.

Eventually, effort in creating and sustaining a virtual team leader community or "virtual team of virtual team leaders" could provide benefits. This amounts to employing virtual team approaches and technologies for the benefit of the community of virtual team leaders.

Training for Virtual Teams

- Communication skills
- Technical tool competency
- Organization and time management
- Problem solving and decision making
- Conflict management

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Adapted from Hoefling (2003)

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Hoefling (2003) identifies key areas of skills and essential competencies that position virtual teams for success in a virtual team environment. Consider specific training for these skills and competencies for virtual CRs:

- Communication skills. Good communication skills are critical in a virtual environment. Communication takes place with both the spoken and written word synchronously and asynchronously. Asynchronous communication can be especially difficult. “Clear articulation, interpersonal caring, effective listening, and clear writing are all essential in a virtual environment” (Hoefling, 2003, p. 81).
- Technical tool competency. Since CRs are located away from technical support personnel, it is very important for a CR to possess some basic troubleshooting skills in order to stay productive throughout their work shift. However, this is not to say that computer expertise is a significant part of the job.
- Organization and time management. These skills are important since a virtual CR works without direct supervision and must be able to work independently and effectively.
- Problem solving and independent decision making. Recognizing that help is not immediately available by looking to a adjacent teammate or to a leader nearby, CRs must be able to solve problems and be able to make good decisions in a timely manner.
- Conflict management. Being sensitive to others and having the ability to avoid procrastination in constructively dealing with conflict is important to building trust and effective teamwork.

Virtual Call Center Enabling Technologies

- Internet
- Intranet
- Virtual Private Networks (VPN)
- Browser-based applications
- Voice over IP (VoIP)
- Diskless workstations

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There are maturing technologies that enable the shift to a virtual call center environment.

- Internet. The proliferation of the internet throughout North America as well as ubiquitous high speed broadband internet connections in households enables the connectivity and provides the bandwidth for data and voice traffic volumes necessary for virtual call center application.
- Intranet. Development of the corporate intranet that provide secure network links between corporate locations and enables communication between them.
- Virtual Private Networks. Technology that allows a location on the internet (such as the home office) to gain secure access to the company intranet just as if the user was behind the company firewall.
- Browser based applications. The move of the company in general and conversion of customer service applications in particular to thin client, browser based applications.
- Voice over IP. Although suffering from over hype in the recent past, this technology seems to be emerging as a viable solution that enables the customer's telephone call to be delivered from the call center to a remote location outside the company voice network.
- Diskless or thin client workstations. Driving down the cost of workstations and associated administrative labor, this technology is mature enough to deploy throughout the company including virtual CRs.

Virtual CR Team Communication Tools

- NetMeeting
- Instant messaging
- Email
- Telephone conferencing
- Team discussion group
- Team website
- Team newsletter

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These tools seem to be the best candidates for intra team communication for virtual CR teams. Included are tools for information exchange and relationship building, synchronous and asynchronous communication as well as push, pull, post, and publish/subscribe. These tools are in addition to the normal tools that CRs already use (such as the telephone, customer care applications, help systems, etc.).

- NetMeeting. Use for online real time intra team communications to support team meetings, coaching, mentoring as well as providing assistance to each other in using customer care applications through sharing, monitoring, and control of the CR computer desktop when necessary.
- Instant messaging. Use of the NetMeeting instant messaging facility to support real time exchange of short messages. This also provides notification of CR availability or unavailability.
- Email. Use for asynchronous communication between team members.
- Telephone conferencing. Use for daily and other periodic team meetings.
- Team discussion group. Establish a facility for asynchronous posting and pulling of information that helps team members achieve team goals.
- Team website. Use for posting of reference information that team members need to be readily and easily accessible.
- Team newsletter. Use for relationship building by keeping team members in touch with each other's personal interests and other events.

The Risks

- Communication
- Conflict resolution
- Coaching
- Team leadership
- Technology failure
- Quality management
- Equipment operation

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These are some of the areas that deserve special attention to avoid manifestation of serious problems in virtual CR teams.

- Communication. Lack of good communication skills results in miscommunication that may go undetected for extend periods of time. This would negatively impact CR productivity and call handling quality.
- Conflict resolution. Conflict between teammates and team leadership destroy trust which in turn result in an unhappy and unproductive team.
- Coaching. An inability to provide timely and effective coaching for virtual CRs when trouble occurs could have a substantial negative effect on CR productivity.
- Team leadership. Leadership within a team is always crucial, but the skill requirements are higher for leaders of virtual teams. An inability to acquire the right skills for virtual team leaders could cause an team effort to fail.
- Technology. Although the technology appears ready for virtual CR teams, there is uncertainty about its viability.
- Quality management. Current mechanisms for multimedia recording of voice and computer screen for training and quality review purposes may prove difficult to employ for virtual CR monitoring.
- Equipment operation. Complexities in installing, operating, and maintaining the computer and telephony equipment for a virtual CR could drastically affect CR productivity.

Conclusions

- Enabling technologies appear viable
- Virtual teams approaches seem feasible
- Risks are substantial
- Ready for pilot

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The literature around virtual teams and the availability of supporting product seem to make the idea of virtual CRs and virtual call center achievable. However, there are substantial risks that warrant careful consideration and stepwise refinement in how available technologies are deployed and virtual teams are organized.

The recommendation is to conduct a pilot where a single CR team can be formed consisting of a virtual team leader and three to five virtual CRs. Vendors can be enlisted to participate and prove their products while virtual team approaches are tried out in a real environment. In any event, it's important that the company gain real world experiences with these approaches so we are positioned to move when the timing is right. The opportunities are exciting for the call center and potentially significant to the operations of the entire company. We look forward to participating in whatever capacity is necessary to make this pilot a success.

Next Steps

- Identify a virtual team leader along with a implementation team
- Prepare timeline and budget for pilot
- Evaluate products
- Prepare feasibility report and seek approval to proceed

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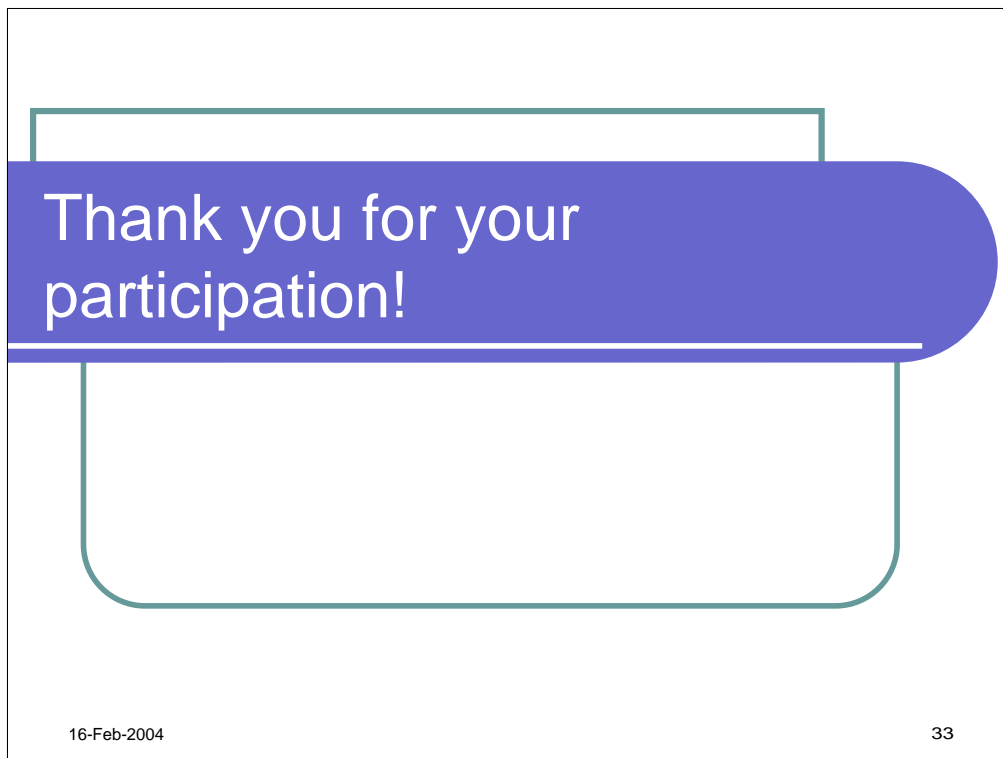
The first step is to establish a leadership team to act as a steering committee to oversee the pilot effort. This would include a leader for the virtual CR team. It is important to be selective in this appointment in order to position the pilot for success. Once the virtual team leader is in place, additional members of the implementation team can be recruited.

The next step is for the implementation team to prepare a project plan for the pilot that includes critical success factors, a timeline, a budget, and scope. The implementation team presents the plan to the steering committee for approval.

When the steering committee grants approval of the plan, product evaluation can begin by contacting vendors with Requests for Information. Once a short list of products is developed, vendors can present their solutions for consideration by the project team. Key to success may include forming partnership alliances with a few vendors.

Once products have been evaluated, tested, and selected, preparation for launching the pilot can begin. Preparations include ordering and installing equipment, selecting the virtual CR team, and training. Launching the pilot would commence with formation of the virtual CR team and conducting a formal project kick off meeting.

As a result of the pilot, we will learn all about the technology, pertinent products, and the feasibility of the approach. This information will be used to formulate a recommendation and action plans for the steps to take place in implementing additional virtual CR teams.



Thank you for your participation!

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Any additional questions?

Thank you all for being here today and for your participation. I hope and trust that we can count on you for your continued support as we tackle this important endeavor.

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