Quality Information and Referral Service Delivery

Managing High Call Volume

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Access System Goal

To deliver the information, assistance and support consumers need to link with available and appropriate resources cost effectively without duplicating of effort.

Access System Challenge

To address high call volume and maximize staff responsiveness

Access System Opportunity

Plan for Success:

Design the Caller's Experience

Enhance the I&R/A Approach

Trends and Philosophies

- *Owning* the Caller
- Creating the Telephone *Experience*
- Build Lasting *Relationships*
- *Starter* of Conversations
- The *Added* Benefit: Quality Assurance
- The Customer *Care* Approach
- The *Continuum* Call: Moving Callers from Question to Knowledge to Action

Designing the Caller's Experience

- How would you rate your I&R/A's customer service?

- Do you have I&R/A performance outcome measures and goals?

- Do you have established standards for the number of rings before answering, hold times, acceptable number of dropped calls and follow-up?

Three I&A Intake Examples

- Every I&R/A specialist is trained to move callers through each stage of the I&R experience: including intake and screening for different programs.

- A triage I&R/A specialist answers telephones, passes appropriate calls to intake and screening.

- Every function is separate: answering telephones, intake and screening for different programs and services are handled separately and by different staff.

Access Is Key

- Having adequate incoming telephone lines.

- Having appropriate number of trained telephone line staff.

- Making sure the right number of people are available at the right times.

Incoming Lines

- Number of lines determines getting in queue or getting a busy signal.

- Determine how often all of your incoming lines are simultaneously busy (calls either being handled or held in queue).

- *A general rule of thumb:* there should be approximately 1.5 lines open for every staff member logged in to handle calls.

Doing the Math
The Queuing Relationship

- Number of Incoming Calls
- Number of I&R/A Staff
- Caller Patience and Need
- Desired Service Levels
- Human Fallibility
- Available Resources
- Mathematic Probability

Call Traffic Indicators

- Recognize that call traffic can be both random and predictable
- Accept that the perfect storm can happen
- Understand the dynamics of your call patterns
  - How many calls on a Monday?
  - How many calls between 4 and 5 pm on Friday?

Forecasting Call Volume

- Do you track the number of calls your I&A typically handles each day of the week?

- Do you track the number of calls your I&A typically handles each hour of every day of the week?

- Forecasting helps I&A managers and specialists anticipate challenges and organize/balance workload.

Doing the Math

Setting Service Levels

- Service levels are the average percentage of calls answered within a specific time
- *The general rule of thumb:* 80/20 (that means 80% of calls are answered in 20 seconds…no more than 2-3 rings)
- Set service level objectives that are in line with your resources (lines, staff)
- Forecast base staff need to meet objective
- Allow for breaks, training, sickness, vacations
- Set an overall schedule to meet objectives
- Monitor

Setting Service Levels

- Your target is an average over the course of a day or week.

- To meet your target in a day, you must strive to meet your target on your busiest hour.

- To meet your target in a week, you must meet your target on your busiest day.

The Power of One Principle

- The absence or presence of one single person handling the lines can make a tremendous difference in the service level during busy times.

- As the service level improves, the law of diminishing returns begins to apply.

Understand Work Processes

- Examine work processes that affect call handling times and I&A specialist availability.

- Examples: computer search time, responding to e-mails during busy call times, leaving the phone to stuff and mail information packets, conducting face to face meetings, updating the database, doing follow-up, advocacy, program screening.

The Caller Experience
The Value of Customer Service

- Develop a person centered access to information approach.
- Put yourself in place of the caller.
- Design a *"preferred"* experience for your caller.
- Get practical investment in high call volume solutions by convening focus groups.
- Use customer focused messaging.

Waiting…

- Understand the caller's degree of motivation for contacting you.
- Anticipate varying levels of expectation.
- Availability of substitutes: Is the aging I&R/A the only show in town?
- Compare your response time with others: 411, 211, LL Bean, I&R and 1-800 Medicare what's the difference? Why?

Strategies to Consider

- Set realistic schedules for staff, e.g., for a 7 hour day, how much time is spent logged in and available for calls?
- Allow time for staff meetings, scheduled breaks, informal meetings, responding to correspondence, outreach, follow-ups.
- A general rule: 80% (5.5 hours out of 7)
- Time off the lines is important for quality, but too much time off affects service level.

Strategies to Consider

- Have calls overflow automatically to a backup person if the wait time exceeds reasonable limits.

- Seek balance -- look at overall quality/volume of service within the realities of resources.

- Use automatic staffing calculators and scheduling software.

- Use call statistics/data to advocate for more resources.

Strategies to Consider

- Anticipate absentee patterns (staff absences more likely to occur on Monday than any other day of the week).

- Use internal reinforcements to manage gaps (staff from other units, volunteers)

- Incorporate part time help.

- Stagger shifts.

- *The rule of thumb:* for large staff groups, multiply by 1.2…if you need 10 staff, then schedule 12.

Strategies to Consider

- ❑ Have customer satisfaction surveys address high call volume/wait times
- ❑ Maximize discovery opportunities
  - ◾ Monitor your unit
  - ◾ Ask the team questions about efficiency
  - ◾ Seek solutions together
  - ◾ Reward success

Strategies to Consider

- Consider the time and value of active listening:
  - Empathy
  - Assessment
  - Customer Care
  - Patience
  - Understanding
  - Quality
  - Standards

Strategies to Consider

- Create a telephone phrase ready reference
- Do immediate documentation of intake and screening data, don't wait!
- Take a personal assessment of your time management
  - What can I do to become more efficient?
  - Where/when am I most inefficient?
  - Where can I set better time limits throughout my day?

Strategies to Consider

- Set up a triage system during anticipated peak calling periods.
- Strategically staff up during busiest times with team members that are trained to offer the full continuum of support.
- Use headsets to free hands to do computer entry while engaging with the caller.
- Eliminate double work with paperwork.
- Incorporate non-paid staff to conduct follow-up

Strategies to Consider

- Use telephone "hold" messages that inform and provide options for callers to call during quieter times.

- Design interactive quizzes that engage callers as they wait.

- Incorporate good news messages into greetings before a live person picks up

- Arrange to conduct research and call back during a quieter, not so busy time.

Questions to Ponder
Strategies

- Is there basic information that that could be provided through automated voice messaging? (i.e., if you are calling about the opening of our new Wellness Center, press 1 for details).
- Do you have the capacity to use voice mail messaging during peak times?
- Can a supervisor log on during lunch to provide extra coverage?

Questions to Ponder
Strategies

- What are the simple time, motion and placement issues in your office? (i.e., 10 times a day, someone walks across the floor to access a directory while on a call)

- Is the computer too slow? Too many pop ups? Can design issues be revisited?

Putting It All Together

- Collect and analyze statistics to understand call patterns.
- Set service level targets that are realistic to your resources and measure performance against the target.
- Schedule staff according to call patterns and service level targets.
- Make a commitment to value the caller experience (this can be time consuming).
- Make person centered access to information the bottom line.