

AGILITY FACTOR



Keeping the Center Up and Running

By Jay Minnucci, Service Agility

Is your operation prepared for the unexpected?

Effective planning will help your center to weather the storm and stay on target.

Between unexpected call demand, turnover rates that spiral upward and budgets that are constantly shrinking, running a contact center under the best of conditions can be a challenge. With all the energy focused on meeting the needs of the here and now, it is easy to understand how questions about business continuity planning (BCP) and disaster recovery planning (DRP) can elicit a collective groan from a leadership team. Expending time and effort on a plan that may never be used seems to be of questionable value. Until, of course, a catastrophe strikes, and it quickly becomes evident that Louis Pasteur was right — fortune favors the prepared mind.

What Is It and Who Owns It?

Let us take a brief moment to differentiate between the two related concepts of business continuity and disaster recovery. Business continuity planning refers to all efforts to avoid disasters. Disaster recovery accepts that despite the best of BC planning, catastrophes will occur and backups are required. Where BCP is the antilock braking that helps to avoid the accident, DRP is the airbag that some will inevitably need. In the contact center, you can think of BCP as the limited access you allow into the switch room so a disgruntled employee cannot cut the power to the ACD. DRP is the battery and generator backup you installed should the ACD lose power despite the appropriate physical security.

Because hardware and software is fallible, BCP and DRP responsibility often lands in the lap of the tech-

nology leadership team. And you will no doubt have to work closely with the technical staff in developing and implementing these plans. Do not make the mistake, though, of thinking that the IT BC/DR programs fully cover contact center needs. A comprehensive BC/DR plan for the center — one that ensures all the people, processes and technology needed to operate effectively — is the responsibility of the contact center leadership team.

The strongest leadership teams understand that performance during a catastrophe is what can separate a great contact center from the also-rans. A cornerstone of an effective DR plan is the establishment of performance targets (busy percentage, abandoned percentage and service level are just some of the common metrics to include) during a disaster. Your targets will vary from those at other companies based on the type of calls handled in the center, the urgency of the contacts, and the organization's commitment to service. Regardless of how aggressive you choose to be in the setting of targets, the overall goal is to make the event as transparent as possible to the customer.

All Disasters Are Not Created Equal

When asked about disasters, people usually think of events like fires, hurricanes, tornados and other incidents that grab headlines. While good planning addresses all of these possibilities, many more can

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affect you, from a severe flu outbreak to an ice storm to a pandemic. You could never identify every potential threat, and fortunately you do not have to. What matters to the business leader is the ability to define the length and breadth of the impact as it affects the four items listed below:

- Contact delivery
- Data and application accessibility
- Workstation equipment
- Skilled staff

Table 1 expands on these items and cross-references them against certain disaster events. As you can see, there are events that affect just one of the key ingredients, and others that influence more than one. You will also notice from the list that no enterprise should consider itself immune, regardless of where the contact center is located. Yes, certain regions have less risk than others do, but I was once involved with a center that was down for three weeks due to the careless acts of a selfish and disgruntled employee. The last time I checked, the presence of unsatisfied staff is common in virtually every contact center (or every organization, for that matter) around the globe.

Another factor affecting the impact of a disaster in a contact center is the reliance on self-service channels. Most organizations have greatly expanded self-service over the past decade or so, utilizing both the Web and inter-

active voice response (IVR) systems to increase the percentage of inquiries handled without agent assistance. Where these systems have been designed properly, it has proven to be a win-win for everyone. Many organizations, though, have made the mistake of forgetting that the contact center is the backup option for customers when these systems are not available. Where self service represents 20% or more of total contacts handled, the loss of these systems presents yet another potential disaster for the call center. Such a possibility must be accounted for not only in the BC and DR plans, but also in the technical design (number of inbound trunks, capacity on the switch, etc.) of the center.

Good Contact Center Design Cures All

Some of the most important BC and DR decisions are made early on, when site design strategy is addressed. The number of sites a center has, and the manner in which contacts are routed to the sites, has a greater impact on overall BC/DR success than just about anything else. Options differ according to the size of the center, but the importance does not change.

For larger centers that need hundreds or thousands of seats to meet customer demand, a multisite design solves many business problems while providing the highest potential for effective backup planning. When the number of seats is greater than 500, I nor-

mally advocate the “six or more” site design. The advantage to this approach is that it provides a simple, quick recovery option that is sustainable for a long period of time. Table 2 (on page 3) highlights this by showing how traffic percents change in a disaster scenario based on the number of sites in operation.

In practical terms, it becomes difficult for centers with five or fewer sites to configure enough capacity, and provide enough staffing resources, to cover the increase required when one site goes down for days, weeks or longer. A six-site operation typically will be engineered so that each site can accept the increased traffic without making any special changes, and will usually be able to ramp up available staffing hours enough to provide adequate service for a prolonged period.

Smaller Center Options

Most contact center leaders do not have the luxury of six or more sites that all function as recovery options for each other. That makes the planning more challenging, yet in no way diminishes the importance of developing an effective solution. Options for those running smaller centers include the following:

- Send contacts to a non-contact center site in the enterprise (warehouse, sales office, etc.)
- Contract with a professional disaster recovery company

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Defining the Impact of a Disaster Event

Obviously, the configuration of a contact center will affect the chart below. This one assumes a one-site center with all equipment and applications housed on site in the server room.

Table 1: Define the Length and Breadth of the Event's Impact on Four Key Areas

Event	Contact Delivery	Data & Application Accessibility	Workstation Equipment	Skilled Staff
Fire in server room	Significant Impact	Significant Impact	No Impact	No Impact
Severe epidemic	No Impact	No Impact	No Impact	Significant Impact
Bomb Threat	No Impact	No Impact	Significant Impact	No Impact
Earthquake that threatens building integrity	Significant Impact	Significant Impact	Significant Impact	No Impact

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- Utilize home agents as a solution for certain disasters
- Utilize an outsourcer, especially if a partnership already exists for overflow, overnight or specialty call handling

The advantage, of course, for a smaller center is that size requirements during a disaster — from trunks, to PCs, to trained staff on the phones — are more manageable. And remember that, in a disaster, you can typically do with fewer seats than you normally have, since utilization is maximized during these times (though if self-service systems also go down, as pointed out above, you may find yourself needing even more capacity than usual). When running the numbers, a smaller center might find that equipping a core group of agents with laptops and the ability to access critical systems from home could be a key strategy for disaster survival.

A Working Solution

Keep in mind that the best plan is little more than a wish if it is not tested. While it can seem uncomfortable to intentionally bring

Table 2: Example of Traffic Percent Change in a Disaster Based on Number of Sites

No. of sites	Normal “Fair Share” Percent of Traffic	“Fair Share” Percent When One Site Goes Down
2	50%	100%
3	33%	50%
4	25%	33%
5	20%	25%
6	17%	20%

a call center down, it is absolutely necessary for peace of mind. I have yet to go through a DR test without finding a great opportunity to further strengthen the plan. If you have never taken the time to test your DR plan, set a date and do it. Make sure that someone on your staff is assigned overall responsibility for documenting and analyzing the results. If you are like most of us, you will find problems that range from typos on the phone number list to backup staff that missed the training on how to move call traffic. In every instance, it is information that is best discovered in a

test, not in a real-life disaster event. You may be one of the lucky ones who never need the information, or then again... 🙄

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