

THE CUSTOMER ALREADY TOLD YOU · CHAPTER TWO

The Ticket Marked Resolved

A case counted by its contacts can be solved four times before it is solved once.

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A NOTE BEFORE YOU READ

This work is offered for education and leadership development. It is not legal, financial, accounting, investment, medical or psychological advice; take the advice of a qualified professional who knows your circumstances. Companies and events are described from the public record as the author understands it; characterisations are the author's analysis. Examples are illustrative, and no particular outcome is promised to any reader.

ABSTRACT

A case counted by its contacts can be solved four times before it is solved once. It is half past nine on a Wednesday evening, and a man is sitting at his kitchen table with the laptop open beside a plate he has pushed to one side. An email has just arrived from his energy supplier. Your case has been resolved, it says. How did we do? Tell us in one click. Below it are ten small numbers in a row, nought to ten. It is the fourth such email in five weeks. The case is a bill for a meter reading taken before he moved in, from the previous tenant's last month. He rang in October and was told it would be corrected. He received a corrected bill with the same figure on it. He used the chat on the website and was told the reading had been updated. He wrote a letter, because somebody at work said a letter goes to a different team. Each contact was closed. Each closure produced an email with ten numbers in it. The figure on the bill has not changed, and a reminder about it is due on Friday. His jaw has been set since the subject line.

CHAPTER TWO

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Half past nine, the email

It is half past nine on a Wednesday evening, and a man is sitting at his kitchen table with the laptop open beside a plate he has pushed to one side. An email has just arrived from his energy supplier. *Your case has been resolved,* it says. *How did we do? Tell us in one click.* Below it are ten small numbers in a row, nought to ten.

It is the fourth such email in five weeks. The case is a bill for a meter reading taken before he moved in, from the previous tenant's last month. He rang in October and was told it would be corrected. He received

a corrected bill with the same figure on it. He used the chat on the website and was told the reading had been updated. He wrote a letter, because somebody at work said a letter goes to a different team. Each contact was closed. Each closure produced an email with ten numbers in it. The figure on the bill has not changed, and a reminder about it is due on Friday. His jaw has been set since the subject line.

He is a composite, drawn from the way these cases are described in the research below and in the house's own practice, and no firm is meant. Somewhere in the supplier's offices, on a screen he will never see, his case appears four times, as four contacts, each handled within its target time, each marked resolved at the first attempt. By the measures the contact centre reports, the supplier has served him well four times. By his own measure, it has not yet served him once.

Ammanuel Santa Anna's canon has a short list of signs that an organisation is hearing its own environment poorly, and one of them reads like a description of the man's last five weeks: "Customer feedback is collected but rarely changes organizational behavior in meaningful ways."[6] The email is feedback, collected. The bill is behaviour, unchanged.

This chapter makes one claim. A firm that measures its contacts instead of its customers' cases will report a problem solved many times before it is solved once, and the gap between the two counts is where the customer's information is lost a second time. The first time was the call itself, the second call that a repairs line answers well and learns nothing from (Chapter 1). The second is the ticket, closed, which turns the customer's unfinished account into a finished number.

A queue built for arrivals

The way most contact centres are measured comes from a respectable place, and it is worth understanding before it is criticised. The mathematics of telephone traffic is more than a century old, and the modern contact centre is managed with its descendants: forecasts of how many calls will arrive in each half-hour, how long each will take, and how many advisers are needed to answer a given share of them within a given number of seconds. In 2003 the operations researchers Noah Gans, Ger Koole and Avishai Mandelbaum published a long tutorial and review of the field, and their summary of it is careful in both directions.[7] Call centres, they wrote, are "fascinating sociotechnical systems in which the behavior of customers and employees is closely intertwined with physical performance measures", and in them traditional operational models "are of great value—and at the same time fundamentally limited".

The value is real. A contact centre that cannot forecast its calls will have too few people on a Monday morning and too many on a Thursday afternoon, and every customer will wait longer for it. The limit is in the unit. The models count arrivals. A call is an arrival, a chat is an arrival, a letter scanned into the system is an arrival, and each is given a reference, handled, and closed. The man at the kitchen table is not an arrival. He is one case that has arrived four times, by three routes, and no part of the arrival-counting apparatus is built to notice that the four are the same.

That is not a failure of the people who run the centre. It is what the instrument was designed to see. A queue built for arrivals will report on arrivals, and if the most important fact about a contact is that it is the fourth about the same thing, the queue will not report it. There is a cost hidden in that blindness, and it lands on the forecast itself. Each of the man's four contacts was an arrival the centre had predicted, from the arrivals of previous years, and staffed for. A contact centre that has always taken repeat contacts will forecast repeat contacts, hire for them, and meet them within its target time, and every one of those measures will be met. The firm is not only failing to see the repeats. It is paying, in advance and in good faith, for the people to answer them. The figure called first-contact resolution is meant to repair this, and in many organisations it is measured honestly. But it is often measured from the firm's side: an adviser ticks a box to say the matter was resolved, or the system assumes it was if the customer does not call back on the same channel within a few days. A letter, sent to a different team, is not a call back. The man's case was resolved at first contact four times.

Santa Anna's canon, writing about what organisations measure, defends the numbers before it questions them. Revenue, growth, market share, satisfaction scores, it says: "These metrics aren't bad — they carry real information." The contact centre's figures carry real information about the queue. They carry almost none about the man.



Six minutes, and the board on the wall

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Six minutes, and the board on the wall

There is a second layer, and it concerns what the numbers do to the people who are measured by them. In many contact centres the figure each adviser is watched on is average handle time: how long, on average, each contact takes. It is a reasonable thing to know, for the forecast. It becomes something else when it is put on a board beside each adviser's name.

An adviser measured on handle time learns, quickly and without anyone telling her to, which kinds of call make her number worse. A billing dispute that needs a meter history pulled from another system, a read-

ing checked against the date of a tenancy, and a corrected bill raised by a team in another building takes twenty minutes to do properly. It takes six to log, promise, and close. She is not dishonest. She is doing what the board on the wall asks of her, and the board does not ask whether the bill was right. W. Edwards Deming, the statistician whose fourteen points for management were set out in *Out of the Crisis* (1986), argued against numerical quotas and work standards on the floor for exactly this reason: a quota measures the count, and the count can be met in ways that defeat the purpose.[8] The argument is summarised here from his book's familiar reading, not from its text, which was not reopened.

John Seddon, whose work on failure demand opened this book, made a related argument about service organisations in *Freedom from Command and Control*: that measures of activity, such as calls handled and time taken, drive the work towards the measure, and that the measures worth having describe the system's purpose from the customer's point of view, such as how long it takes, end to end, for the thing the customer wanted to be done.[9] That too is given in summary, from his book's argument as it is usually taught.

The Margin, another of the house's books, reads [what a number beside a name does to the person who reads it](https://hautelumiere.life/editions/rsd-master-rsd-in-acedemia-final-manuscriptt/page/), and the contact centre is a building full of such numbers. The adviser who closes the man's case in six minutes knows, as she closes it, that it will come back. She has learned not to mind, because minding does not change the board. Santa Anna's canon, in its history of how programmes have been assessed, describes the same confusion in a setting far from any contact centre:

> *But output counting, as a comprehensive approach to assessment, has a fundamental limitation: it confuses activity with achievement. A literacy program that distributes ten thousand books has produced an impressive output. But if those books sit unread on shelves — if the program failed to account for the cultural context, the reading levels of the recipients, or the absence of lighting in their homes — then the output tells us almost nothing about the program's actual contribution to human flourishing.*

The board on the wall counts books distributed. The man's bill is a book nobody read.

How did we do?

The email at the kitchen table asks a question, and the answer it collects is less informative than it looks. Satisfaction surveys sent after a contact are answered by the people who choose to answer them, and those people are not a random sample of the customers who were served.

The marketing scientists Abbie Griffin and John Hauser studied how firms gather the voice of the customer for product development, in a paper published in 1993, and among their findings was one they stated plainly in its abstract.[10] Their data, they wrote, "demonstrate a self-selection bias in satisfaction measures

that are used commonly for QFD and for corporate incentive programs", QFD being quality function deployment, the method many firms use to carry customers' needs into a product's design. Their study was of product development, not contact centres, and it should be read that way. But the mechanism travels easily. A customer whose problem was solved and who feels warmly towards the firm may answer. A customer whose problem was solved and who feels nothing may not. A customer whose problem was not solved, on his fourth email, may answer with a zero, or may close the laptop, which leaves no number at all.

Santa Anna's canon describes the same limit in a passage about the surveys organisations run on their own staff, and the sentence holds for customers too: "The survey captures what people are willing to report — not what they actually feel." The man is willing to report a great deal. He is not willing to report it into ten small numbers in a row, for the fourth time.

The house's Luminous 100, its reading of the frameworks every consultancy sells, makes a remark about the best-known one-question survey that applies to every survey of its kind. Of the Net Promoter Score it says: "The follow-up qualitative question ("why?") is where the real insight lives." The email at the kitchen table has no *why*. It has ten numbers, and a button.

There is a fairer word to say for the survey. It is cheap, it is regular, and a firm that watches its scores over years will see some things move that it would otherwise miss. The trouble is not the survey. It is the habit of treating the score as the customer's account, when the customer's account is in the contacts, in his own words, four times, and the score is what is left when the words are taken away.

Following one case home

What changes this is a different unit of attention, and it can be adopted in a week without new software. The director responsible for the contact centre, or the head of billing, or whoever will listen, takes ten customers who contacted the firm last month. Not ten contacts: ten customers. For each one, she gathers every contact the customer made about the same matter, by every route, calls and chats and letters and emails and the visit to the shop, using the customer's account rather than the ticket reference. And she reads them in order, as the customer lived them.

Santa Anna's canon gives the instruction in one line, as part of its method for reading an organisation through its processes rather than its reports: "Follow a customer complaint from receipt to resolution." The discipline is in the word *resolution*. It means the point at which the customer would say the thing was done, not the point at which a ticket was closed. For the man at the kitchen table, it is the day a bill arrives with the right figure on it, and nothing else.

For each case she writes down three numbers and one sentence. How many contacts did the customer make before the matter was done? How many days passed between the first contact and the last? How

many of the contacts were the customer chasing, or explaining again what he had already explained? And the sentence is the customer's own, taken from the first contact, of what he wanted.

The order of what she does matters more than the numbers. She reads the cases with an adviser beside her, one who handles such contacts every day, because the adviser will see at once where each case went wrong: the system that could not show a meter history, the team in another building with no telephone, the letter that went into a queue nobody owned. She does not ask the adviser why the case was closed. She asks what the adviser would have needed to finish it. The answers are usually specific, and they are usually the same three or four things.

Read the man at the kitchen table this way, and his case comes out on a single line. Five contacts by three routes, over forty-one days, four of them chasing or explaining again. His first sentence, from the call in October: *the reading on this bill is from before I moved in.* And the adviser's answer, when the director asks what she would have needed to finish it at the first contact, takes ten seconds. She would have needed to see the date the tenancy began beside the date of the reading, which the billing system holds and the contact screen does not show, and she would have needed the authority to raise a corrected bill herself, which is held by a team in another building. Neither is expensive. Neither has been asked for, because nobody before had read his five contacts in a row.

The other nine cases are different in their details and similar in their shape. A direct debit set up twice. A moving-house request that reached one system and not another. A complaint about a smart meter that was closed as a technical query. In most of them the information needed to finish the case was already somewhere in the firm, and in most of them the person who spoke to the customer could not see it or could not act on it.

Chapter 7 carries the case trace as a working page, with the rules for gathering contacts across channels and the count of clean cases, and the mistakes made at each step, and Chapter 6 places it in the order of a first ninety days. It is the customer's version of [walking one ordinary order backwards through a building, desk by desk]({{BOOK:orgdev-flow}}), and it shows the same thing a walk shows, which is that most of the time is spent waiting and most of the waiting is in the gaps between teams.

There are mistakes to watch for, and they are familiar. A director who chooses the ten worst cases, the ones that reached the chief executive's inbox, will design for a crisis rather than for the ordinary month. A trace that gathers only calls, because calls are easiest to find, will miss the letter, and the letter is often where the case went to die. And a director who reads the cases and then sets a target for contacts per case has repeated, one level up, the error the board on the wall made: the count will fall, and some of it will fall because customers have stopped trying. The reading is for finding causes. The measure that will later say whether the causes were removed has to be designed with more care than a target, and with the customers who give up (Chapter 3) counted as well as the ones who ring.

What the ten cases usually change first is a definition. A case is finished when the customer does not need to come back about it. That is a definition a firm can measure from its own records, by looking, after an agreed period, for any further contact from the same customer about the same matter, by any route. It is harder to measure than a ticked box. It is also the only version of first-contact resolution that the man at the kitchen table would recognise.



The second unit

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The second unit

The deeper change is in what the director now sees when she looks at the contact centre's figures. Before, she had one unit, the contact, and a set of measures that described the queue very well. After, she has two, and the second, the case, describes the customer. The two disagree, often, and the disagreements are the most useful thing on her desk. A month in which contacts fall and cases take longer to finish is not a good month. A month in which contacts rise because a new letter invites customers to ring before a problem becomes a dispute may be an excellent one.

Santa Anna's canon describes the healthy version of this in a list of signs that information moves well through an organisation, and the second of them is the plainest: "Bad news travels as fast as good news." The case trace is how bad news about a bill travels to the person who can change the system that produced it, in the customer's own words, before the reminder goes out on Friday.

It also changes the adviser's position. She was measured on six minutes. She is now one of two people who read a case end to end, and the only one of the two who could have predicted, in the first minute of the man's first call, that the meter history would be the problem. A firm that asks her what she would have needed has found the cheapest source of improvement in the building. It is the same knowledge it has been paying her for, every day, and closing in six minutes.

Tracing cases in practice

The article this chapter began as ended at a kitchen table. The book can go further, into the finer points of tracing cases inside an organisation that was not built to show them.

Choose the ten at random from an ordinary month, from the list of customers who made any contact, and replace any case that is still open with the next one on the list. The point is to see what ordinary looks like. The cases that reached the chief executive's inbox will be traced anyway; they are not a sample of anything.

Gather by the customer, not the reference. In most organisations a customer's contacts live in several systems: the telephony platform, the case-management tool, the shared inbox, the scanned post, the notes field of the billing system, the shop's own log. Few of these share an identifier other than the customer's account or address. The convenor, or whoever does the gathering, should expect the first case to take a morning and the tenth to take forty minutes, as the routes through the systems become familiar. Write down, for each case, which systems had to be searched; the list is itself a finding, because it is the list an adviser would need to search to see the case whole.

Define *done* before you read. The definition that works is the customer's: the matter is finished when the customer did not need to come back about it within an agreed period. Agree the period at the start, and keep it the same for every case. A few weeks suits most service matters; a billing dispute may need a full

cycle. Write the customer's own first sentence at the top of each trace, because it is the only fair test of whether the case ended where it should have.

Read each case with an adviser, and ask one question at each contact: *what would the person handling this have needed to finish it here?* The answers fall, in most organisations, into four groups: information held elsewhere that the adviser could not see; authority held elsewhere that the adviser could not use; a hand-off to a team with no way back to the customer; and a rule that required the customer to do something the customer could not reasonably know to do. Count the answers by group across the ten cases. The largest group is usually where the first change belongs.

Count the clean cases. Of the ten, how many were done in one contact by the customer's definition? The figure is not a target and should not be reported as one. It is the plainest description an organisation can give itself of how often it serves a customer once, and it should be read beside the contact centre's own first-contact figure. Where the two disagree, the gap is the hidden repeat this chapter is about.

Make the first change at the point of contact. The cheapest improvements are usually to the screen and the mandate: show the adviser the one piece of information that would have finished most cases, and give the adviser authority to act on it within a stated limit. These cost little, and they move the finishing of a case to the person who already knows how. Then trace another ten in four weeks, and expect the largest group to have changed. Chapter 6 places the trace in the second month of the ninety days, and Chapter 7 gives the case trace and the clean-case count as working pages.

Half past nine, in February

It is half past nine on a Wednesday evening in February, and the man is at the kitchen table again, the laptop shut. In January, after his fifth contact, a different adviser rang him back, which nobody had done before, and said that she could see the reading came from the previous tenancy and that she had the authority to correct it herself, and she did, while he was on the phone. The bill that came a week later had the right figure on it. He has not contacted the supplier since.

No email arrived to say his case had been resolved. There was nothing left to resolve.

The plate is still beside the laptop, and this time he has finished his supper.

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