

The Calls That Stop Coming

A fall in what customers need to say is a gain only when the counting was agreed before the answer was known.

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THE LICENCE

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Chapter Five of The Customer Already Told You. The whole book, with every chapter, is at business.hautelumiere.life/library/the-customer-already-told-you (DOI https://doi.org/10.5281/zenodo.23989055).

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 fall in what customers need to say is a gain only when the counting was agreed before the answer was known. It is a quarter to six on the last Thursday in March, and the finance director of a housing association is reading the paper the board will discuss on Monday. It is the budget for the coming year, and on page four, in a box, there is a line she did not write. Calls to the repairs line, it says, have fallen by a fifth since the autumn, following changes to how repairs are booked. The line proposes that next year's budget assume the fall continues, and that the contact centre's agency hours be reduced to match. She believes something real has happened. She has sat at the end of the row with the spare headset herself, at the head of customer services' invitation, and heard fewer people begin with I'm ringing again about . But four other things sit in her stomach like a stone. The winter was mild, and in a mild winter fewer boilers fail. In January the association launched a way for tenants to report repairs online, and some of the calls that are no longer calls are now forms.

CHAPTER FIVE

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Quarter to six, the budget paper

It is a quarter to six on the last Thursday in March, and the finance director of a housing association is reading the paper the board will discuss on Monday. It is the budget for the coming year, and on page four, in a box, there is a line she did not write. Calls to the repairs line, it says, have fallen by a fifth since the autumn, following changes to how repairs are booked. The line proposes that next year's budget assume the fall continues, and that the contact centre's agency hours be reduced to match.

She believes something real has happened. She has sat at the end of the row with the spare headset herself, at the head of customer services' invitation, and heard fewer people begin with *I'm ringing again about*. But four other things sit in her stomach like a stone. The winter was mild, and in a mild winter fewer boilers fail. In January the association launched a way for tenants to report repairs online, and some of the calls that are no longer calls are now forms. The advisers have been sorting calls into value demand and failure demand since November, and a sorting that people know is being watched is a sorting that can drift. And she cannot rule out the hardest possibility of all: that some tenants have stopped calling because, after the third missed appointment, they concluded that calling did not help.

She is a composite, drawn from the way these evenings are described in the research below and in the house's own practice, and no firm is meant. If she lets the line stand and the fall is partly the weather, next winter's calls will arrive at a contact centre that has been cut to fit a mild one. If she strikes it out, the head of customer services, whose team did change the work, will learn that a gain her board can read is a gain her board will not believe.

Ammanuel Santa Anna's canon has a passage that sits over the box on page four. Writing on the history of how organisations assess what they do, it begins by defending the habit before it names the cost[23]:

> *The impulse to quantify is not, in itself, problematic — it is an expression of our longing to understand, to improve, to steward our resources wisely. But somewhere along the winding path from ancient tallying sticks to modern impact dashboards, something essential was lost. We became so good at counting that we forgot to ask what was worth counting in the first place.*

The calls are worth counting. Whether a fall in them is a gain depends on what else is counted beside them.

This chapter makes one claim, and it closes the argument the four chapters before it have made. The information customers give a firm, in second calls, in reopened cases, in silences and in recoveries, holds a gain, and the gain can be measured honestly enough for both sides of the firm to sign, but only if what counts as a gain is agreed before anyone knows the answer. A fall in what customers have to say is good news only when the firm can show they stopped needing to say it.

Exit dressed as improvement

The hardest of her four worries comes from the economist who wrote the book on it. In *Exit, Voice, and Loyalty* (1970), Albert Hirschman distinguished the customer who stays and complains from the customer who leaves, and argued that the second tells an organisation much less than the first.[24] A housing association's tenants cannot easily leave; that is part of what makes social housing different from a shop. But they can stop using voice. A tenant who has learned that reporting a repair produces a five-hour wait and a missed appointment may simply stop reporting, and live with the dripping tap, and the repairs line will record her as a call that did not come.

Read that way, a fall in calls is ambiguous in the most uncomfortable direction. Claes Fornell and Birger Wernerfelt, building a formal model on Hirschman's distinction in 1987, concluded that a firm's goal of reducing complaints is "questionable", and that complaints from dissatisfied customers should, within cost limits, be maximised rather than minimised.[25] Their model was about firms that can lose customers, not landlords who mostly cannot, and its conclusions follow from its assumptions. But the inversion it states is the finance director's worry exactly. A falling count of contacts can be a system that fails less, or a population that has stopped expecting anything.

The two have to be told apart by something other than the count itself, and the association already holds what it needs. Every year, by law, a gas engineer visits every rented home with a gas supply for a safety check.[26] When an engineer finds a repair the tenant never reported, a radiator that has not worked since October, a tap held shut with a cloth, it is written on the job sheet. That record is collected for a different purpose by a different team, and it does not depend on tenants calling. If calls fall and unreported repairs found at the safety check rise, the tenants have gone quiet. If both fall, the system is failing them less.

Santa Anna's canon puts the principle under that check in a line about how an organisation and the people it serves shape each other: "Recognize that you cannot change one side without changing both." The repairs service changed, and the tenants' behaviour changed in response. The measure has to read both.

A mild winter

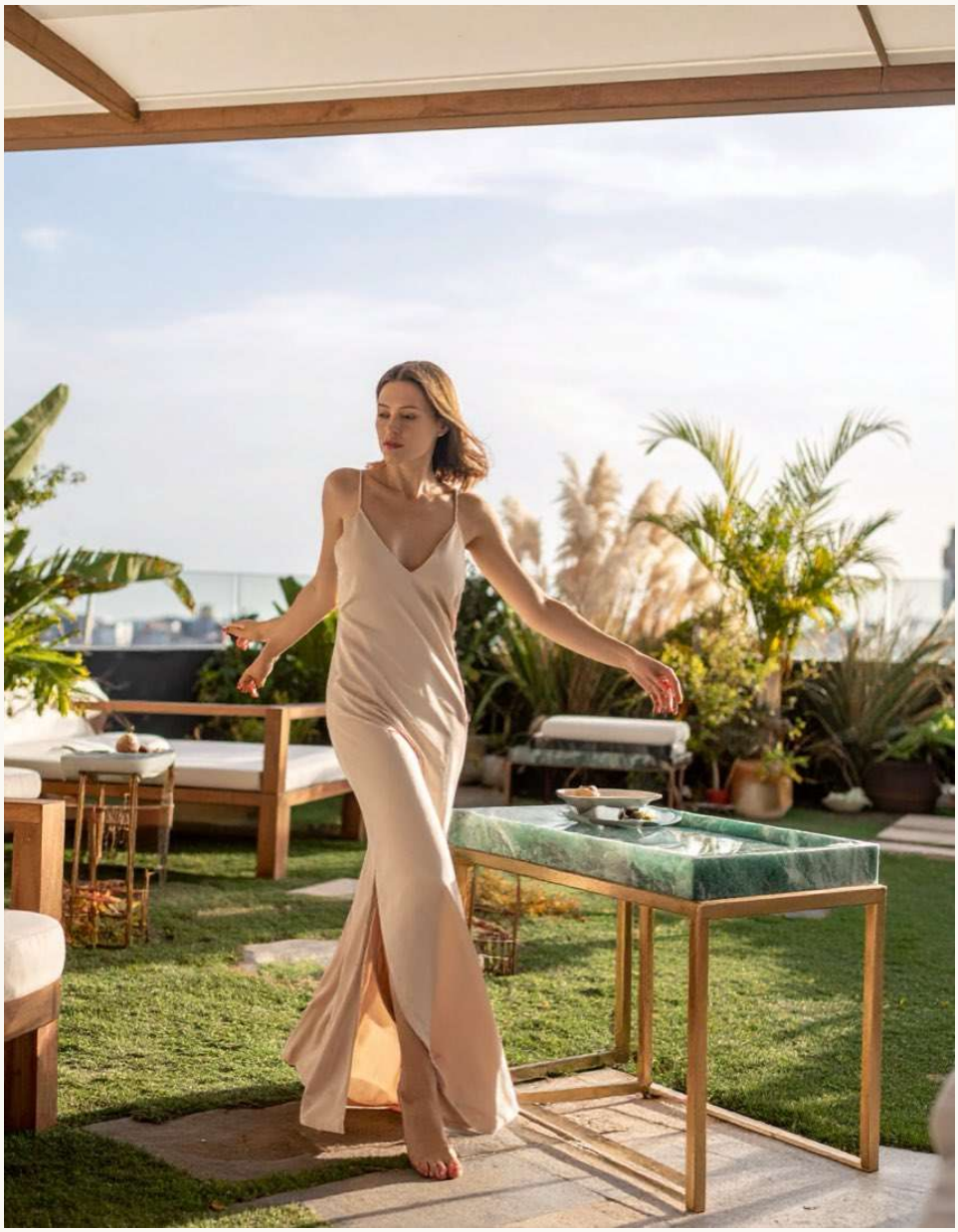
The second worry is older and has been met before, in [the measurement of a gain on a factory floor]({{BOOK:orgdev-flow}}). A comparison between one period and another tells you little if the two periods differed for reasons nobody controlled. The autumn and winter just ended were mild. A cold winter produces more boiler failures, more frozen pipes and more condensation, and therefore more first calls and more second ones, whatever the repairs service does.

The answer is the one the long practice of measured savings gives. A baseline drawn from two or three years of the association's own records, long enough to show what an ordinary winter and a hard one look like. An adjustment for the weather, agreed before the results are known, calculated from a record the association does not control, such as the number of cold days in each month from the national weather service. And the comparison made not between this winter and last, but between this winter's calls and the number the history says a winter like this one would have produced.

There is a point here about which number to use, and it changes the argument on page four. Calls are the wrong unit for the gain, because calls rise and fall with the number of repairs, and the number of repairs rises and falls with the weather and the age of the housing. What the changes to the booking system were meant to reduce was not repairs but the calls each repair produces, and the visits each repair takes. The association records both. Its phone system can count calls about a job by the job's reference. Its repairs system counts visits per completed job, including those that ended with *no access* or *wrong part*. Contacts per

repair, and visits per repair, are much less sensitive to a mild winter than calls are, because the weather changes how many repairs there are more than it changes how many times each one has to be chased.

Santa Anna's canon, in its list of the principles by which a living system regulates itself, gives the warning that belongs over every comparison of this kind: "Map ALL loops before changing anything — unintended consequences live in unseen loops." The weather is one loop. The new website is another. The tenants' own conclusion about whether calling helps is a third, and it is the one most easily missed.



The label that moves

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The label that moves

The third worry is about the sorting. Since November, the advisers have marked each call as value demand or failure demand, which is the practice that the head of customer services began with a spare headset (Chapter 1), and the share of failure demand has fallen. The finance director knows the history of what happens when such a share becomes a number people are judged by, because she has read the committee papers from the years when England's councils reported avoidable contact as a national indicator.[27] A label that matters to the people applying it is a label that will drift.

The social scientist Donald Campbell stated the general law in 1979, in a paper on evaluating public programmes: the more a quantitative indicator is used for social decision-making, the more it is subject to corruption pressures, and the more apt it is to distort the processes it was meant to monitor.[28] That is a paraphrase of his argument, not a quotation, and the paper was not reopened for this book. Nobody on the repairs line is dishonest. But a call about a missed appointment that could be heard as a new request, *can you book me in for Thursday?*, will be heard that way more often by a team that has been praised for the falling share.

The guard against drift is old and cheap. The sorting is used for study, and the measure that goes in the budget is not the share of failure demand at all; it is contacts per repair and visits per repair, which are counted by the systems rather than labelled by people. And once a month, someone with no stake in the result, from the internal audit team or a neighbouring landlord, listens to a random sample of recorded calls and sorts them blind. If the advisers' sorting and the blind sorting begin to diverge, the label has moved, and nobody needs to be blamed for it to be corrected.

The house's Luminous 100 says of lean thinking, the tradition from which the language of waste and failure demand descends, that "The philosophy is more important than the tools." The sorting sheet is a tool. The philosophy is that a call is information about the system, and a team that is rewarded for producing fewer of one label has been handed the tool and not the philosophy.

The channel that shifts

The fourth worry is the simplest to check and the one most often missed. In January the association launched online repair reporting. Every contact that moved from the phone to the website disappeared from the phone figures. Some of those contacts were first reports, which is what the website was for. Some were tenants chasing a repair that had not happened, by the route that no longer required them to wait on hold.

A measure that counts calls will report the website as a gain in the repairs service. It is nothing of the kind; it is the same demand arriving by another door. The case-level count, which follows one customer's matter across every route rather than one contact at a time, is the remedy, applied to a budget: every contact

about a repair, by any route, counted against that repair. If contacts per repair fall across all channels together, the system is failing less. If calls fall and forms rise by the same amount, the system has moved its queue.

Santa Anna's canon, in its method for walking a value stream, gives the question that catches this and every other blind spot in a measure, in one line: "Whose perspective is absent? Customers? Suppliers? The night shift? The temporary staff?" A budget line built from the phone system's figures is the contact centre's perspective. The tenant's is in the repairs system, the website, the gas engineer's job sheet and the complaint that went to the ombudsman. A measure that both sides can sign has to be built from enough of them that no single team's records can flatter it.

What a customer's word is worth

None of this would matter if the information customers give were worth little. The evidence that it is worth a good deal is real and should be stated at its proper strength. In 2004 Eugene Anderson, Claes Fornell and Sanal Mazvancheryl developed a framework for how customer satisfaction affects a firm's future cash flows, and tested it against firms' market values.[29] They found "a positive association between customer satisfaction and shareholder value", and "significant variation in the association across industries and firms." That is an association across many firms, not a promise about any one, and it says nothing about how much any particular change is worth. It is enough to say that what customers feel is not a soft quantity that finance can safely ignore. Santa Anna's book on doing business as a living system says of the stories customers tell about a firm that they are "the living data of your venture — richer, more dimensional, and more strategically valuable than any metric." The finance director does not need to believe all of that to believe the half that matters: the second call is data, and so is the call that never came.

For the housing association, the worth is more concrete and lives in its own records. Every second call is an adviser's time. Every second visit is an operative's morning, a van, and often a part ordered twice. Every repair a tenant stops reporting is a repair that will be found later, larger. The gain from the changes to the booking system is the difference between what those things cost in a year like this one and what the history says they would have cost, adjusted for the weather and the housing, read from records the association already keeps, and checked by someone with no stake in the answer.

What the association does with that gain is a separate question, and it is not this book's to answer. The board may decide to buy fewer agency hours, or to keep the hours and spend them ringing tenants back, or something else. Who decides, and how any part of a measured gain is shared with the people whose work produced it, are questions for each organisation and the people it covers, and they are the substance of an engagement rather than a book. What can be said is that every one of those decisions is easier when nobody in the room doubts the number.



Signing it

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Signing it

Picture the same finance director in the same office a year later, at the same hour.

In April, before the board took any decision, she sat down with the head of customer services, the head of repairs, an adviser from the line and a tenant from the association's scrutiny panel, and agreed what they would count. Contacts per completed repair, across every channel. Visits per completed repair, from the repairs system. A history of three years, so that the baseline showed hard winters and mild ones. An adjustment for cold days, from the weather service's published monthly figures, and one for homes added to or

sold from the stock. Two balancing measures beside the main ones: unreported repairs found at the annual gas safety check, and complaints to the ombudsman. A blind sample of recorded calls each month, sorted by the internal auditor. And the figures, every month, on the wall of the contact centre and in the tenants' newsletter, in the same form the board would see them.

The conversation was harder than she expected. The head of repairs wanted visits per repair left out, because his operatives' first-time fix rate was another department's target, and agreed to include it when the tenant on the panel said that a second visit was the thing tenants minded most. The head of customer services wanted the baseline taken from the autumn before the changes, which had been unusually bad, and the finance director explained, as gently as she could, that a baseline chosen at its worst point flatters the first year and punishes every year after it. The canon's governance chapter describes the rule that made the tenant's sentence count, in a practice where an organisation gathers what its members are noticing: "the frontline employee's observation carries equal weight with the CEO's." The scrutiny panel's tenant was the only person in the room who had waited in for a plumber.

In November the first cold snap arrived, and calls rose, and the board's chair rang her to ask whether the gain had vanished. She sent him the month's page. Calls were up. Contacts per repair, adjusted for the cold, were still below the baseline's range, and unreported repairs at the safety checks had not risen. The chair read it twice and said that he understood it, which was the first time anyone on the board had said that about a figure from the contact centre.

The page itself was plain. Each month's contacts per repair, plotted against the range the three years of history had shown for that month, with the adjustment for cold days written underneath in a sentence rather than a formula. Beside it, visits per repair, plotted the same way. Below them, the two balancing measures, and the result of the month's blind sample: how many of the forty recorded calls the auditor had sorted differently from the advisers, and which way. A point was treated as news only when it fell outside the history's range, or when several in a row moved the same way, which is the old discipline of telling the ordinary variation of a system from a real change in it.

In February the blind sample began to disagree. The auditor had sorted six calls as failure demand that the advisers had sorted as new requests, all of them tenants ringing to rebook appointments that had been cancelled by text. Nobody had been gaming anything. The new text messages had created a kind of call that the sorting rules did not mention, and the advisers had put it in the box that seemed closest. The rule was written into the sorting sheet that week, and the agreement the finance director had signed in April already said what to do when a system changed during the year: name the change, note the month, and read the figures on either side of it separately. It took one meeting.

Chapter 7 carries the measurement conversation for failure demand as a run sheet, with the questions in the order they are asked, the balancing measures and the one-page agreement, and Chapter 6 places it in the order of a first ninety days. It does not carry the design of any arrangement for sharing a gain, which

belongs to the organisation and the people it covers. Luminous Prosperity works with organisations to find the gains they already hold, in what their customers and their people already know, and to share in what is found; sharing is only honest when the measurement is, which is why the house has spent this much of a chapter on the part most consultancies leave to the end.

Every place a firm stops hearing its customer, the second call, the closed ticket, the silent departure and the recovery whose cause nobody reads (Chapter 4), holds a gain, and none of those gains can be counted until the counting is agreed. That is why the measure is settled first, and read last.

The measurement conversation for demand

The article this chapter began as ended with a signed page. The book can go further, into the finer points of a measurement conversation about what customers no longer need to say.

Put the right people in the room. The person responsible for the money. The person responsible for the operation that produces the contacts, and the person who owns the upstream system that produces the failures, because both their records will be read. Someone who speaks for the people whose work will change: an adviser, an operative. Someone who speaks for the customers, where the organisation has a way of finding one: a tenant panel, a customer council, a long-standing client. And the person who will do the calculation, and whoever will check it.

Choose units that follow the case, not the channel. Contacts per completed case, across every route by which customers reach the organisation. Visits, deliveries or attempts per completed job, where the work involves going somewhere. Days from first contact to done, by the customer's definition. These units are less sensitive than raw contact counts to the things nobody controls, such as weather or the size of the customer base, and they are counted by systems rather than labelled by people.

Draw the baseline long. Two or three years of the organisation's own records, where they exist, so that the ordinary range of each measure is visible, including its seasons. Copy the history and date it before anything changes, as Chapter 6 sets out, so that it cannot later be argued over.

Name the adjustments in advance, and take each from a record the organisation does not control. Weather from the national service's published figures. The size of the customer base from the organisation's own register. Changes in law or regulation by their dates. Each adjustment is written down with how it will be calculated before the first result is known. An adjustment proposed after the results are in should be refused, however reasonable it sounds, because the reason it sounds reasonable is that someone now knows which way it points.

Put exit beside every measure. The most important balancing measure for any fall in customer contact is a signal of customers who have stopped asking rather than stopped needing to ask. Every organisation has one, if it looks: problems found by its own staff that were never reported, complaints that went to an om-

budsman or regulator rather than the firm, cancellations, lapsed accounts, reviews written elsewhere. Choose one or two that the organisation already records, and agree that a fall in contacts with a rise in these is not a gain.

Check the labels blind. Where any part of the measure depends on people classifying contacts, have someone with no stake sort a random sample each month without seeing the original classification, and compare. Agreement is the evidence that the label has not moved. Disagreement is a finding about the rules, not an accusation against the people applying them.

Name what will change if the gain is real. A fall in failure demand frees capacity, and capacity is only money when something is done with it: hours not bought, overtime not worked, visits not made, a backlog cleared, customers rung back. The conversation should say, in plain words, which of those the organisation expects, because that is what finance will later look for in its own records.

What this conversation does not settle is how a measured gain is then shared with the people who found it: the proportions, the timing, the thresholds and the terms. Those depend on the organisation, its people and its history, and they are decided with the people who will be covered. For an organisation working with Luminous Prosperity they are the substance of the engagement, not of a book. Chapter 6 places the conversation in the last month of the ninety days, and Chapter 7 gives its questions in order and the one-page agreement.

Quarter to six, a year later

It is a quarter to six on the last Thursday in March, and the finance director is reading next year's budget paper. On page four there is a box, and this time she wrote it. Contacts per completed repair have fallen, it says, against a three-year baseline, after the adjustment for cold days and for the change in stock, and visits per repair have fallen with them. Unreported repairs found at safety checks are within their usual range. The figure is smaller than the one in last year's box. It is also, for the first time, a figure the head of customer services, the head of repairs and the tenant on the panel have each read and signed.

The stone that sat in her stomach a year ago is not there. She initials the page, and closes the paper.

A NOTE FROM THE HOUSE

A fall in what customers need to say is a gain only when both sides agreed how to count it before anyone knew the answer. That agreement is where a gainshare begins. Luminous Prosperity Inc. reads the front door with an organisation, and is paid as a share of the gain it helps find.

REQUEST A CONVERSATION

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