

At Your Service

The Texas Association of School Boards boosts member responsiveness and call agent productivity with advanced contact center capabilities.

Rick Tillotson is a student of best-practice telecommunications. He has to be. As telecom manager for the nonprofit Texas Association of School Boards (TASB), his hands are full keeping TASB responsive to the wide-ranging needs and expectations of its 1,042 member school boards. At the same time, he faces the perennial pinch of nonprofits everywhere: Keep costs down yet service levels up.

That's no easy task for Tillotson, given that TASB is the largest school board association in the country. In addition to representing every school district in the Lone Star state, it also counts as members 146 educational cooperatives, 46 junior colleges, 38 tax appraisal districts and 19 regional education service centers. The school boards alone preside over combined annual expenditures of \$28 billion, employ more than 560,000 people and serve four million Texas students.

With the help of some 400 employees, this 55-year-old organization fulfills a mission as enormous as the state is big. It provides members with state and federal government advocacy; legal and governance services; legislative information and training; parent and community outreach; and assistance with school operations, especially purchasing, financial and human resource services, benefits and risk management.

Among scores of activities across this wide-ranging service portfolio, TASB manages a mult-billion-dollar investment pool, runs an online purchasing cooperative that sells everything from pencils to school buses (even dump trucks), and publishes an online policy manual for its member districts that compiles and updates a comprehensive collection of all relevant federal and state laws and regulations. "And it's all done within the strictest cost controls, because our bedrock reason for being is to save our members' money so they can focus more resources on their students," Tillotson says.

To help deliver on that, just over 100 of TASB's employees are in member-facing roles as front-line contact agents, support associates, and their supervisors who answer more than a dozen toll-free service numbers. They operate out of six relatively small contact centers, all located at TASB's Austin headquarters except for one, with 10 agents located in Houston to serve the risk management side of its operations.

RISKY BUSINESS

The risk management part of TASB's operations started in response to school boards' needs when insurance companies pulled up stakes in Texas 30 years ago and left school districts with neither indemnity against health care costs nor protection from hazards and liability. Today TASB offers members health, property-casualty, unemployment and workers' compensation insurance policies, all at the lowest-possible cost.

“When we first began providing risk management, it was responding to a most pressing membership need,” says Dubravka Romano, TASB’s associate executive director. “Our focus is always on cost benefits for the local districts so that more resources can go directly to students in the classroom. So whatever we can do to save our members time and money, we do. We share their goal of doing what’s best for the schoolchildren of Texas.”

Because risk management is TASB’s biggest undertaking, it has the largest contact center that fields the most calls at TASB – some 165,000 of the 190,000 calls that come into its contact centers each year.

These volumes were growing, and Tillotson says it was becoming clear that to better serve its members, TASB needed a way to streamline its call handling, increase first-contact resolution of issues, and leverage the expertise of its entire organization. Productivity gains were important, too.

“In general, people’s expectations of how they want their calls handled have risen dramatically over the years as they experience the sophisticated contact center capabilities of large commercial enterprises,” he explains. “That’s the level of responsiveness and service we wanted to give our members, too, but our budgets just couldn’t afford it.”

With TASB’s other contact centers having as few as two to three agents, often its old system would place the caller on hold when those agents were busy – sometimes for several minutes, Tillotson says.

“We were giving our clients music and announcements while they were on hold, but no information about their estimated wait time or alternative means of contacting us,” he explains. “Conversely, we had no way of knowing whether there were one or 100 calls in queue, nor did we know who in our organization might be available to help in handling the calls.”

THE MADDENING CROWD

As a result the customer experience could be maddening. When a teacher called TASB for an insurance claim, for example, he or she might be left in a “black hole” of a call queue for an indeterminate time without options for leaving a message and without knowing how long the wait for an agent would be. During school hours, teachers have extremely limited break time, so sitting on hold for several minutes just wasn’t acceptable.

“The only way to give them choices was at a given point to automatically route them out of the automated call distribution (ACD) system and over to the voice-message system,” Tillotson says. “But if they wanted to continue holding, they would be put back in the queue and lose their place in line.” Maddening indeed.

In addition, when a call center agent needed to transfer a caller to a financial analyst or other TASB associate, the agent had to manually track him or her down. “They would stand up and shout over the cubicle to see whether Bob or Alicia was available,” Tillotson says.

Altogether this wasn't exactly the informed, responsive and customer-friendly face TASB wanted to give its association members. Tillotson finds this especially ironic because the culture of TASB is so service-oriented. "People work at TASB because, deep-down, they believe what they're doing ultimately benefits the kids, so agents were especially frustrated that, for lack of tools, they couldn't give members the service and responsiveness that they experience themselves when they call large companies for their own personal business."

Tillotson, too, was frustrated because he knew the contact center tools were out there, but unfortunately out of reach of TASB's budget. "I'd go around the country and visit these large call centers with hundreds if not thousands of agents as part of me staying up on the latest tools and techniques, and it'd blow my mind what they could do. But there just wasn't anything on the market close to what small-to-medium businesses like TASB needed."

That's when he turned to Siemens, maker of TASB's Hicom 300H Model 80 Communications Server, a nearly 10-year-old PBX with a built-in Flex-Routing feature that TASB was using for ACD. "It's a great workhorse, but we were bugging Siemens for the capabilities of a large call center – priced for our size organization," Tillotson says.

PLAYING THE USER GROUP CARD

To be sure, Tillotson had a certain measure of clout with Siemens, given his volunteer position as the 2003-2004 president of JUST-US, the Siemens U.S. users group. JUST-US (Joint Users of Siemens Telecom U.S.) is a nonprofit organization, independent of Siemens, with about 750 member companies. Its community of users speaks volumes as a chief advocate for the features and functionality in Siemens equipment that could benefit the entire installed base.

Tillotson knew about the Siemens HiPath ProCenter contact center portfolio that targeted large enterprise needs, in league with offerings from the likes of Avaya and Rockwell and used in some of the nation's largest, high-volume contact centers like Fidelity Investments and others. So he decided to raise the issue of porting those features that small and medium-sized businesses would find most useful into a more affordable package.

"Even JUST-US members who are large, global enterprises often also have small and medium call centers at some locations. Regardless of size, we are all concerned about getting the most of our substantial investments in Siemens equipment," he says. In a sense, he changed roles from a student of best practices to a teacher of what they could be for smaller businesses, given the right tools.

Tillotson said Siemens carefully considered the JUST-US requirements, then went about leveraging its existing HiPath ProCenter large enterprise technologies to meet the needs. "Frankly, if there was anything else competitive for our sized business, I wouldn't have thought twice about evaluating it or even acquiring it, but there wasn't," he says.

WISH GRANTED

He got his wish in February when TASB became Siemens' first field trial of the IP-ready HiPath ProCenter Agile, a server-based contact center application with many of the features and capabilities found in the higher-end HiPath ProCenter suite for much bigger enterprises. TASB acquired 108 seat licenses to cover its staff of contact agents,

supervisors and supporting associates. With installation, the value of the entire system is approximately \$60,000.

The Agile system runs on a separate Windows 2000 server, internetworked between TASB's data and voice networks to the Hicom 300H Communications Server. When TASB completes its migration to a Microsoft environment later this year, it will be able then to integrate its LDAP directory for point-and-click speed-dial capabilities.

For voicemail caller support, TASB uses the Siemens HiPath Xpressions unified messaging system. For outbound messages announcing wait times and member news and information, Tillotson installed the Siemens HiPath Call Director along with an Interlalia XMU+ digital recorder and message playback device.

He also took the opportunity to replace more than half of TASB's 14-year-old Rolmphones with new Siemens IP-capable optiPoint 500 desksets. He plans on eventually replacing the rest with Siemens optiPoint softclients that will provide full point-and-click telephony capabilities to the agents' Dell OptiPlex desktop PCs.

In fact, despite being designed for TASB-sized contact center needs, the Agile application includes presence-aware and collaboration tools not yet available on other large enterprise contact center suites.

Presence-awareness is rooted in the technology behind instant messaging's "buddy lists" that show who's online at any given time. Siemens took this concept a giant step further with its OpenScape software introduced in 2003 that provides real-time availability and collaboration capabilities across an enterprise.

The HiPath Procenter Agile application features a "Team List" and "Team Bar," both developed to be context- and role-sensitive to support collaboration on caller issues and facilitate first-call resolutions and both integrated into the application's desktop GUI. These tools allow agents to visually monitor who's available to help with a particular issue and, with one-click, they can opt to transfer the call to that person, park their member call and consult with the expert, or set up a multiparty conference. The latter capability can help front-line agents listen and learn while the expert addresses the issue. And whichever way they choose to direct a call, Tillotson says, agents are now able to close more issues on a first-call basis "without having to shout out for Bob, Alicia or Greg, for that matter."

With the new system, TASB member callers first choose a topic from the integrated automated attendant menu. They're then automatically routed to an available agent, who gets a simultaneous screen-pop on his desktop PC with caller ID, plus data on how long the caller has been waiting in the queue and from where the call originated, in case it was transferred. Agents can also attach notes to the call's screen that gets transferred with the call.

Using the Team Bar on his desktop, the agent can see the availability and status of subject matter experts inside TASB. For example, the Team Bar icons show the agent whether an insurance adjuster is back from lunch and available to help the client with an insurance inquiry. Then, using Agile's collaboration tools, the agent can either conference in the adjuster or transfer the caller to him, with a click of his mouse. This eliminates blind transfers where a caller gets placed in voicemail or back in the queue.

“This way, the agent can get off the phone and on to the next call faster, rescuing that teacher who needs to get back to class,” Tillotson says.

If no agents are available, callers are given the estimated wait time for an available agent, along with options for emailing their inquiry or leaving a voicemail message. “If they choose to wait on hold, at least they know how long it will be,” he says.

TASB’s agents can customize their desktop as to what they see on their screen, including their own Team Bars, speed dial lists and personal call statistics to monitor their performance. They can even reduce the entire Agent desktop to an icon in the Windows taskbar. “This lets them can set up the agent desktop any way they want, by tearing off different toolbars from the desktop and parking them anywhere on their screen,” says Tillotson.

HOUSTON, WE HAVE A SOLUTION

By way of a point-to-point T1 line, TASB also extended the contact center capabilities of its HiPath ProCenter Agile application to its Houston risk management group. “Now those agents and experts are as much a part of us as if they’re across the street,” Tillotson says. “We could never put them on the system before because they couldn’t ‘see’ us, and we couldn’t ‘see’ them. Now we can with Agile’s presence and collaboration features,” he says.

Siemens worked with Tillotson and other members of TASB’s 40-person IT group to install the new system, which offers wizards to simplify installation and a graphical administrative Design Center for building routing and call processing flows. Tillotson says it took an afternoon to load the application onto the server, then a day to build the group profiles and train the supervisors, with agent and associate training the next day. “It took just just over an hour of training to get people up to speed,” Tillotson says.

Performance reporting is important to contact center management, and the Agile application’s graphical Report Center lets TASB’s 10 contact center supervisors run detailed reports and trend analyses on their group’s performance. TASB is currently training these supervisors on Agile’s graphical Design Center, which lets them make changes to groups or queues on the fly with a drag-and-drop visual tool – without IT having to make these changes for them.

For agents, their personal performance statistics are viewable on their desktop in real-time so they can compare them to the groups’ targets. “That way, they can tell if they are taking too few calls or spending too much time on a call,” Tillotson says.

Given that Agile’s capabilities are so far ahead of what TASB had before, Tillotson says he lacks a baseline to fully quantify the gains in member satisfaction and agent productivity, but he’s quick to add that he has no doubt TASB callers are getting better and faster service when they call in. “We don’t have any angry callers on the line anymore,” he explains, “and TASB’s agents are happier, too, with new tools that have improved their productivity and morale by letting them be more responsive to member calls.”

ON THE PATH TO IP

Tillotson’s new Siemens wish list includes incorporating customer relationship management (CRM) software into TASB’s contact center capabilities and eventually

replacing TASB's PBX with a voice-over-IP (VoIP) platform that will converge its voice and data networks for even more cost-savings.

The latter prospect is especially compelling, he says, because it will give TASB more options and flexibility for using agents and experts outside the Austin area. With a VoIP platform and HiPath ProCenter Agile, agents and experts working remotely or from home outside Austin will be able to use the organization's IP virtual private network (VPN) to access the call center and log onto the Agile system.

For Tillotson, best practices mean hiring the best, wherever they may be. "With Agile and VoIP, I can find the best agent wherever he or she may be. We're no longer limited to who lives locally," he says. "If the best person for the job lives in Three Rivers, Texas, and can get a decent broadband connection into the VPN, I can hire her."

Of course, the ability to hire good people translates into better customer service, Tillotson says. "And now, because we can respond more efficiently to inquiries from trustees and school district staff, you can almost hear the smiles in our members' voices on the phone," he adds. 2675

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