Tool #34: Profile of a CRM Rotation Program
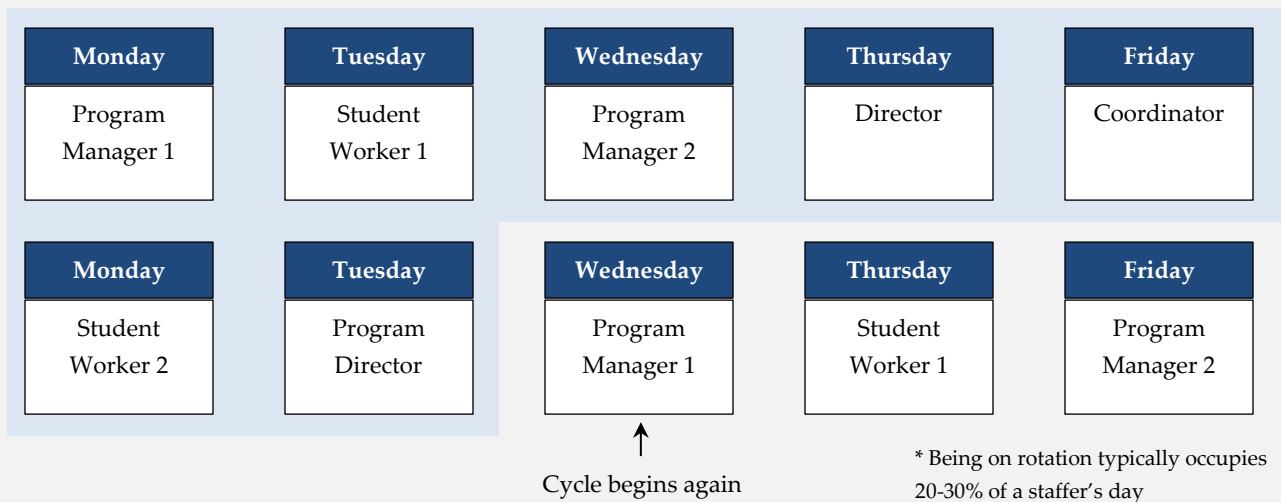
Rotation programs were originally pioneered by large corporations looking to train engineers are now used by all types of business, the federal government, even a handful of universities. Under the concept, employees cycle through a variety of positions spending several weeks or months in each. They can be particularly useful for exposing back-end employees, who rarely engage in customer interaction to front-line realities and therefore don't hold these issues in mind when doing their work. This, contacts explain, happens all too often and undermines the success of CRM implementation. With the experience of front-line customer service in mind, employees are better able to internalize customer support philosophies and engineer processes that better facilitate support functions.

The University of Houston's Educational Technology and University Outreach unit, dedicated to supporting nontraditional and online education, implemented a version of a rotation program to strengthen their call center function by making employees more empathetic to both prospects' questions and to call center efforts to address those queries. Staff who otherwise would never have had to work with prospects were assigned a day to staff the phones. The profile below further explains how they structured the initiative and also provides discussion questions for participants to consider post-rotation.

Rotation Program at the University of Houston

Structure and Logistics

Rotation Calendar*

Monday	Tuesday	Wednesday	Thursday	Friday
Program Manager 1	Student Worker 1	Program Manager 2	Director	Coordinator

Monday	Tuesday	Wednesday	Thursday	Friday
Student Worker 2	Program Director	Program Manager 1	Student Worker 1	Program Manager 2

↑
Cycle begins again

* Being on rotation typically occupies 20-30% of a staffer's day

Responsibilities

On their assigned days, communication staffers are responsible for:

- Answering the prospect inquiry phone line
- Managing any instant chats that pop up
- Working extended hours (8:30am-6:30pm)

Communications staffers are **not responsible** for responding to email. The CRM will continue to automatically route emails to the appropriate point of contact (typically a program director, as emails tend to be program-specific).

Structure and Logistics (Cont'd)

Contingencies

- Student workers serve as a second-line should the dedicated staffer be pulled away from the phone/chat window for a legitimate reason.
- Program coordinators, all of whom carry a heavy advising load, are not included in the formal rotation schedule. However, they often staff the lines when they are available as it is their comfort zone.

Rules

Rotation participants receive the following guidelines to enforce the unit's customer service philosophy which stresses approachability and helpfulness.

- ➢ **Say What You Know.** Build off your experience with the institution to have a more enriching conversation. Don't deviate from what you know to be true, however.
- ➢ **Admit What You Don't Know.** Earn approachability and trust by admitting when you don't have the answer. Just make sure to track the answer down and deliver it to the caller.
- ➢ **Never Speculate.** If you don't know something, find a colleague who does and get the information from him/her (see below).
- ➢ **Be Honest.** Don't give a caller an easy answer over a complicated reality.
- ➢ **Never Send A Caller Somewhere Else.**
  - o Never instruct a caller to read the website—read it for him/her
  - o Never re-direct a caller to another colleague—ask that individual yourself
- ➢ **Listen To Your Caller.** People call when they have specific needs. Staff should identify and keep in mind those needs while also proactively anticipating further needs.
- ➢ **Drive Your Caller to a Conversation with an Advisor.** This is the next step advocated in all communications collateral and the next step in nurturing a qualified lead.

Lessons Learned (Representative)

Insight into difficulty sparks innovation
When one rotation participant realized how frustrating it was not to have the answers to callers' questions, he started making tip sheets that are widely used today.

Fast and efficient Internal knowledge sharing is key
No tip sheet has all the answers, so some participants proposed using an instant chat system internally to get quick answers from "experts" like program directors.

We can improve our website with this intel
Observed trends in callers' questions led to additions to the website.

Adapting the Rotation Program at Your Institution

Implementation Options

While the University of Houston uses its rotation program year-round as a regular part of its call center staffing model, for many institutions this may not be viable. However, other options allow staff to experience frontline realities without significantly disrupting their regular workload and compromising call center quality.

Option 1: Cameo Appearance

Staff members spend one day each on the phone lines. This option is obviously more time efficient, though contacts warn that learning is limited when the frontline experience is a one-time variation from the norm.

Option 2: Recurring Guest Star (recommended)

Staff members go through multiple rotations (contacts recommend 3+). Discussion activities are scheduled after each experience and after the program is complete.

Discussion Questions

Use the questions below to prompt a discussion among a small group of staff who participated in the rotation program or as the questions in an exit interview (person-to-person or in worksheet form) to the experience:

1. Was anything about the experience surprising (e.g., questions asked, questions not asked, etc.)?
2. What was frustrating about the experience?
3. What was enjoyable about the experience?
4. What could make the experience easier for one-the-phone staff and more enriching for callers?
5. Did you notice any trends in what callers were asking?
6. What one improvement would you make to the call management process?