

# The boardroom view of **Contact Centres**

By **Giles Potter**, Managing Director, Great Outcomes Limited

It's almost March, and for many companies 31 March is their financial year-end, a very important event for the board.



*Photograph courtesy of Ricoh.*

The chair will be requiring contents for the annual report, and other board members will be thinking about their input to the final board meeting for the year. What's been achieved for the year will be discussed, and key items planned for the new year will be well underway. So what communication is relevant from the contact centre, and how can the relationship with Marketing be presented? The contact centre is not an island, it is very dependent on what others in the organisation know, and think about its operation, and most importantly the Board of Directors. This article considers various topics about Contact Centres that are of importance for the Board, and that Contact Centre leaders can consider when deciding what, and how to communicate, within the Marketing context.

## Familiarity is the first step

It is best when preparing board material to start by establishing a good knowledge of the board members; who is the chair, who are the individual members, and why are they on the board. Each will have a specific area of expertise, and you may be able to establish their role on the board. In particular, there may be a board member with Marketing and/or Communications credentials. As the contact centre spans telecommunications, and has a major staff component as well as its Marketing

The contact centre is a key distribution channel for any organisation, and provides a core interface for customers attracted to its marketing propositions.

role, there are likely to be board members with IT and HR backgrounds who will take an increased interest in contact centre matters. A second aspect of your preparation is to know and meet your basic compliance requirements. The board will expect that you can confirm that your operation is meeting all legal requirements, and in some cases, the governance and social commitments that are published (some companies publish these on their websites or in their annual report). Contact centre leaders should be completely familiar with the legal and compliance requirements for the centre, e.g. privacy information, fair trading and contract laws, are just a few legal examples. Compliance requirements will be specific to the company e.g. internal audit returns, management compliance.

## Teamwork

The contact centre is a key distribution channel for any organisation, and provides a core interface for customers attracted to its marketing propositions. As one of the range of interaction channels, the Board will need to see how well Marketing strategies are being delivered and how effective they are. Communications should focus on how well the contact centre works in unison with Marketing and is an integrated part of the organisation, capturing the opportunities created by acquisition and retention activity. In addition, examples of how the contact centre is meeting customer needs and delivering new sales, or

increasing customer satisfaction as a result of the tactical activity would be good.

## Showcase the Centre

As the boardroom can feel very distant from business operations, take opportunities to give board members first hand exposure to life in the business whenever possible. Tours of new centres, presentations about new initiatives, and one:one discussions are highly valuable because they are a legitimate opportunity for board members to see what's going on without crossing into the roles of the senior executives.

On these occasions contact centre leaders have their moment to present a constructive view of how the channel makes a difference to the organisation, including appropriately handling challenges that board members need to know about. For instance, explain how the contact centre has worked with Marketing to establish new channels such as eDirect marketing via email, text or the web. Be articulate in providing confirmed results about new prospects or customers through the complete range of channels now present in the contact centre (it's not just voice anymore after all!).

## Reinforce a single customer view

Contact centres that incorporate CRM systems are one of the few parts of an organisation that have a 360 degree view of the customer's relationship. The benefits of integrated systems are vitally important to board members, either to validate past investments in IT systems, or if not integrated, to provide evidence of how the business has to work around the current systems. The contact centre has first hand experience of how business systems and processes work, and

The contact centre has first hand experience of how business systems and processes work, and how enabling they are for managing the customer interface.

how enabling they are for managing the customer interface. When systems work well, it can transform the business and lead to vast increases in new revenues.

A good example is the Warehouse Stationery, which has fully integrated systems in its contact centre. Claudia Vidal, Systems and Technology Manager, Warehouse Stationery, states that their CRM system "sits at the centre of the customer contact centre, enabling all our processes to work seamlessly and effectively". Experiential information like this provides an insight that needs to be visible to the board.

## Upward communication to the Board

Establishing who in your audience you are communicating with is the first place to start. Once you know the respective roles and interests of the board members, use the range of formats that you have available to profile the role of the contact centre: presentations, contact centre site tours, one:one discussions. Confirm for board members the ways that the contact centre is delivering on the strategies and tactics that Marketing has initiated – new channels such as eDirect are of particular importance. Outlining recent results will give context to the increased range of channels now managed in the contact centre, e.g. how many new prospects and customers the strategy has attracted. If possible, providing first hand examples of previous board actions will also be highly valuable information to support future investment requests, e.g. the benefits of newly integrated IT systems and a single customer view.



## GILES POTTER

Giles Potter is Managing Director of Great Outcomes Ltd, a call and contact centre consultancy. Great Outcomes assists companies to develop their contact centre by improving management systems and practices through change management projects, leading new centre developments, and facilitating the strategy for new centres. [www.great-outcomes.com](http://www.great-outcomes.com)