Case Study I – Customer Service

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**Introduction**

Presently at Xerox customer service is divided into four functional areas: Equipment service, supplies marketing, account administration and telebusiness. This separation of duties creates a customer service problem. Time and money is wasted in the customer service delivery process. For example, a customer may call the equipment service area while their need lies in supplies. Both customer and employee time is exhausted in transferring the call and customer information is lost during the transfer. Xerox has decided that it makes good business sense to reconsider the current structure of customer service. In an effort to streamline and improve employee and customer interactions, they have decided to integrate their customer service delivery methods. We have been given the task to plan the design of the training required to facilitate the integration process.

**Background:**

As stated previously, there are presently four different functional organizations within customer service: equipment service, supplies marketing, account administration, and telebusiness. Each functional organization has its own management structure, work processes, technology infrastructure, customer databases, and information systems. None of these systems are connected to any other functional group. These organizations service the same group of customers, whose inquiries are sometimes intertwined. We have been assigned the task of addressing the training issues and development of a learning strategy surrounding consolidation of these various areas. We will determine the best learning strategy for the integrated customer services pilot. In setting goals and building a learning plan for the training necessary to integrate customer service we have made several assumptions. The first assumption is that employees are competent in the functional area they presently serve. Secondly, within each functional area there are individual workers that can be deemed “experts” in that area. We assume that during the fifteen week training period, employees will be released from their regular schedules and be available for the training schedules. Finally, physical structures can be altered in order to facilitate training and future work practices.

There are two components that must be addressed in the design of this pilot program. The first component is employee training. Employees from each of the four functional groups must gain competency in all customer service areas. This will be accomplished through a combination of classroom and authentic environment training.

A second component of the restructuring involves the Xerox training organization. Training presently has four main areas: Requirements gathering, curriculum design, curriculum development, and delivery of training to the employees. Each functional area has a unique directive for the creation and dissemination of training. In addition to consolidation the customer service areas, we will also be looking at the redesign of the training system to better serve employees within the new integrated approach at Xerox.
Learning Goals

As a guide for our development of a curriculum and learning plan, we clarified the goals necessary to achieve improved customer service through integration of functional areas and the corporate training organization. Our goals for the learning design are to:

• Supply effective and efficient customer service.
• Produce employees who are competent in the areas of supply ordering, customer account information, and requests for service.
• Empower employees with the knowledge and decision making authority to provide complete customer care.
• Increase employee job satisfaction
• Enhance revenue through increased solve rate, workforce reduction, greater efficiency, and increased sales.
• Increase customer loyalty and retention

Learning Strategy

Integrated Customer Service Pilot Training

Structure

In order to promote peer collaboration and coaching, employees will be divided into training and work teams. There will be four teams of twelve employees each. Each team will then subdivide into three pods of four individuals. These pods will contain one member from each of the four functional areas. These teams will train and work together, providing peer coaching and scaffolding of skills. The four members of a pod will be responsible for supplying expertise and support within their pod. The pod will be assessed and evaluated as a whole. Incentives will be based on pod performance. The physical environment must be modified in order to facilitate pod interaction. The training day will be divided into shifts. Each day will contain four two-hour shifts. Each team will spend a shift in hard skill training, a shift in soft skill training, and two shifts in “on the job”, observing and working within the pods.

Classroom

Classroom training will supply hard and soft skills to employees. Hard skills will cover the topics of technology training (i.e. copier structure and common repair problems), account administration, equipment sales, and telebusiness. Soft skill training will include phone interaction, conflict resolution, team development, troubleshooting, and sales tactics. In order to develop the content of the classroom training, a learning hierarchy will be built for each content area. From this hierarchy, a baseline level of proficiency will be gleaned. Training will be geared to achieving this baseline level. Instructional materials will be developed to guide mastery learning of these strategic skills. Employees will be assessed as to their current skill level within each of the four hard skill areas and areas of deficiency will be noted and addressed. As part of the process, within the pod each member will be guided to create and supply a tip sheet identifying strategic knowledge within their content area of experience. Other members of their pod can then use these tip sheets to help them in their phone interactions outside their areas of expertise. These quick tips reference sheets will serve as a transparent guide to the worker in assessing customer difficulties.
Additionally, training will focus on developing workers cognitive models regarding the overall business structure and how customer service fits within this configuration. This cognitive method of training will also be applied to the understanding of the overall structure and function of the equipment. For example in order to develop a cognitive model of the problems customers face in dealing with equipment, a role playing exercise could be employed.

“On the job”

In order to prepare workers for their new roles, it is important that they have practice and experience within an authentic environment. For this reason we suggest half of the day be spent in “on the job” training. During the first month of training learners will observe outside of their area of competency before answering customer calls. Following the first month of training there will be no discrimination in directing or answering customer calls. Each member will then use the expertise of other pod members to scaffold their performance.

We took a situative approach to constructing the second component of the integrated customer service training. Our design of an effective social interactive model that enhances learning includes the components of physical space and facilitation of interaction between workers. Workers will be seated such that each group member has side-to-side contact with at least two other pod members and is located directly across from the fourth member of the group. Visual and auditory contact can take place at all times. Boundary walls will be placed between teams to reduce noise pollution and support the ability to converse within pods. There will be a trainer/manager overseeing each team. The learning environment would consist of the described layout in order to foster collaboration and peer coaching. A rudimentary model of the plan can be seen below.

Re-organization of the Education Department

Design of the curriculum

Consolidation of the four functional areas within the corporate training team will allow for an integrated approach to curriculum design and development. The curriculum design for the integrated customer services pilot should reflect the problems and
situations faced by employees. The curriculum design should reflect authentic problems and situations faced by customers and service representatives. Customer service requests and feedback should be used to form the core of the curriculum. Reflections of the members from each “silo” or functional department are important to the design of the training. For example, an experienced repairman should be interviewed as to what training he feels would be valuable for customer service representatives. (What equipment knowledge would help increase solve rate and reduce service calls)

Training Team

As a new component of the integrated approach to customer service, trainer/managers will be integrated into the training teams. There will be one member of the larger the training team assigned to each team. This person would function as part of the team, following the training practices with the other members of the team. They must have a proficient knowledge of in each functional area in order to effectively train and manage pod members. The trainer/manager will have previous experience in curriculum development and training to be able to assess team progress. Based on the assessment of team activity, the trainer will develop team specific training. The trainer/manager is now a responsive mechanism to the needs of the team.

Conclusion

Our recommendation for a learning strategy revolves around the concepts of fostering collaboration, peer coaching, team building and developing cognitive models and skills. We feel that our training process including traditional classroom instruction and training within an authentic environment will supply workers with the tools to meet the company customer service goals.