Gathering and Using Contact Center Calls to Understand Customer Behavior
By John Caddell

A provider of subscription-based services to consumers sells its product using inbound telemarketing. Prospects, after reading a brochure or visiting the company web site, dial the company's sales line and a customer service representative (CSR) takes them through the signup process.

Many of those callers didn't end up as customers, and the company didn't know why. Were they poor prospects? Did something happen in the signup process? Or was the product different than advertised? High-level statistics gathered from the contact center didn't shed any light on the situation; it simply reinforced what management already knew—some bought, and some didn't.

There was a rich set of data, unseen, however, that had the answers—the recordings on the company's computer aided telephony system. Digging into that data store and finding patterns in the raw dialogue between prospects and customer-service reps held the key to understanding the buy-don't buy puzzle.

This paper illustrates a method for unearthing, understanding and acting on that information.

The Method Outlined:

Prepare
Before gathering information, it's vitally important to have a clear definition of the question you're trying to answer. In the case above, the question was, in essence, "what are the differences between the situations when the caller buys the product and when she doesn't?" From this question, the consultant works with the company management to identify things to look for in each call that might influence buying or not buying. These things will define some of the codes that the listener will track when listening to the calls. General codes include the gender of the caller, the caller location, time of day, etc. Specific codes would depend on the particular project and could include, for example, whether the CSR "asked for the order" or whether there appeared to be caller confusion as to product options.

Gather a sample of calls
The first step is to gather a meaningful sample of calls. Depending on the project, between 100 and 200 calls will be needed from within the target set to ensure there are enough examples to reveal patterns.

Listen and encode
The next step is to listen to the selected calls. While listening, the consultant enters data in the coding spreadsheet based on the information in each call. I have found that it's useful to listen very carefully, sometimes two or three times each, to the first 10% of the call sample, as the calls often contain information that was not identified in the preparation. This information can suggest additional codes.

It's desirable that codes are as objective as possible. It's better to have a code like "caller mentioned price was high" as opposed to "call was emotionally intense." In short, try to avoid introducing any additional bias on the part of the coder.

In addition to coding, the consultant identifies calls that are particularly resonant, interesting, or revealing. Those calls will be transcribed and reviewed/discussed in a group session described below.

Refine for sensemaking
After listening to all the calls, there will be a completed coding spreadsheet and a list of calls that were noteworthy. The noteworthy calls are then transcribed.

The next step is to refine the information so it can be useful for sensemaking. The essence of this task is removing the noise from the data so the patterns can be more readily identified (note that the task at this stage is *not* finding the patterns themselves—this must be left to the client group to do).

Based on the coded data, a group of charts is created. Both bar charts and contingency diagrams (looking at pairwise relationships of data) are helpful here. There will be more charts than can be used, so the consultant should remove those that aren't particularly insightful (that, for example, show that men or women buy in equal proportion).

For the transcripts, the consultant reads through the transcripts and isolates potentially useful exchanges between CSR and customer. A rule of thumb is to pull out the bits that influenced the decision to transcribe in the first place. These fragments should be less than two pages long (and shorter is desirable).

Evaluate and find patterns
A group then gathers to make sense of the selected stories and the coded data. The consultant takes the group through a workshop to review the call excerpts and graphs to find relationships and patterns that emerge. [You can find an excellent overview of how to do this in Cynthia Kurtz' book "Working With Stories," pp. 85-92.]

It can be illuminating to have a subset of the group look at the excerpts and another subset look at the graphs. The groups can then explain to each other what they've learned, and see if the two different perspectives reinforce, contradict, or illustrate different insights.

Out of this process, several possibilities are likely (and frequently occur in the same project):

1. The team learns some surprising insights about the CSR-customer interaction. For example, they might learn that few of the CSRs are actually using the best practices they have been trained to use.
2. Something that one or a small group of people already knew is learned by the entire group, causing something that was a minority opinion to become a consensus view.
3. A completely new learning emerges from the process, for example that a sales channel previously viewed as marginal is shown to be a potentially powerful tool.

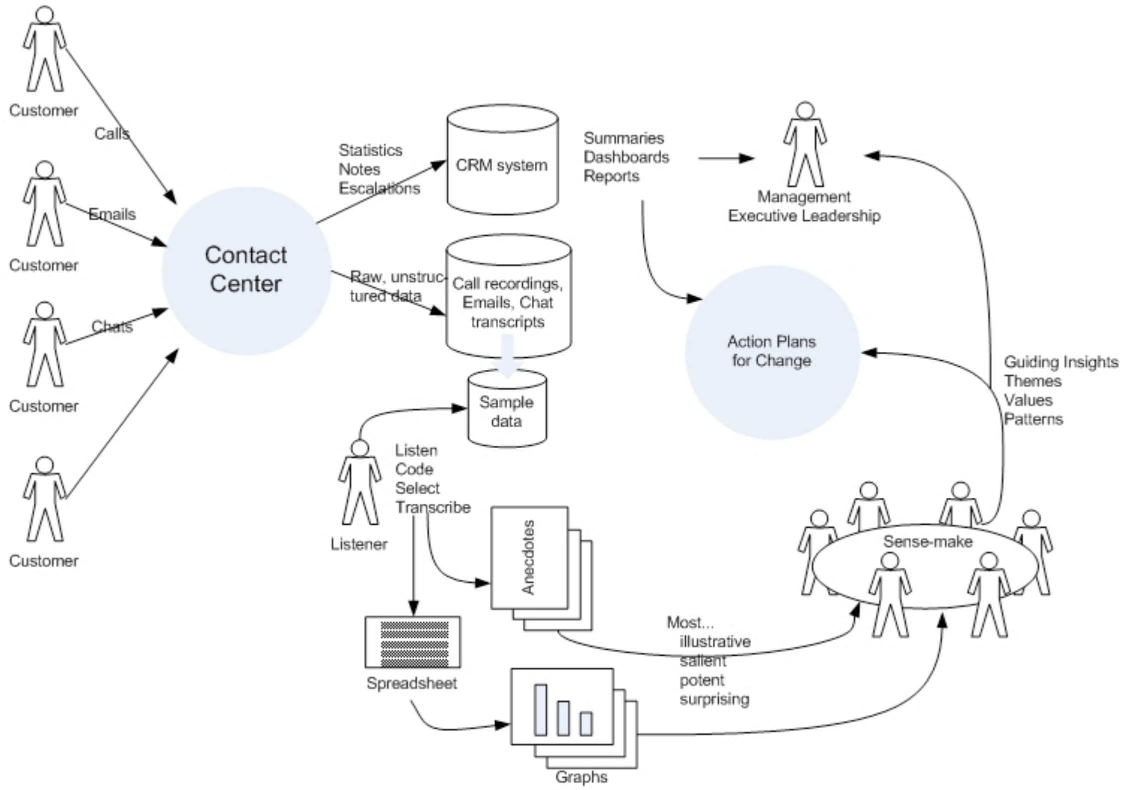
Develop action plans and experiments
The evaluation described just above will result—after a lot of thinking and dialogue—in a list of themes and guiding insights—things that were learned that can be used as a basis for action.

The resulting actions will fall across a spectrum—some will be simple changes easily implemented, others will require using outside expertise to implement.

A third area of actions applies to problems where a straightforward solution isn't obvious. The best way to attack these problems is by experimenting with various approaches and assessing how effectively they work. Highly effective solutions would then be rolled out more broadly, and ineffective solutions would not move past the test phase. This experimental approach, called "safe-fail" by Dave Snowden, applies to problem areas where you can't evaluate cause and effect in advance.

Iterate and measure
The company, once experiments are underway, can iterate the process above to measure the effects of the experiments on the business problem, then adjust and remeasure, before committing to large-scale changes in process.

The entire process is depicted in the following diagram:



Conclusion

Almost any company with a call center captures and retains recordings of its customer calls. That data is an invaluable resource for gathering important data about how customers and prospects feel about the company and the products it sells. It's important to understand that the data is not reducible into algorithms or statistics—it needs to be reviewed as it was created—moment-to-moment, with all words, pauses, breaths intact.

But listening—really listening—to those calls, and carefully considering what's in them, can illuminate difficult business questions, help monitor the effects of changes and detect subtle changes in attitude from the customer base.

Other uses of this method:

- Assessing customer reaction to new product releases
- Evaluating the perceptions of a company's customer service
- Gathering authentic customer experiences to elucidate branding messages

References:

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