Texas Real Estate Commission
Internal Audit Services

Diagnostic Review of:

The Reception and Communication Service Call Center Operations

#18-002

June 21, 2018

McConnell & Jones LLP
CERTIFIED PUBLIC ACCOUNTANTS

Executive Summary

McConnell & Jones LLP (MJ), serving as the outsourced internal audit function (Internal Audit) for the Texas Real Estate Commission(TREC) and Texas Appraiser Licensing and Certification Board (TALCB), provided consulting and advisory services to evaluate the agency's **Reception and Communication Service (RCS) division's call center operations**. This engagement focused on providing an independent assessment of the current call center operations and phone system to determine potential short-term actions the agency can take to address the challenges that they are currently facing with responsiveness to customer telephone calls.

Because this was a quick analysis to identify current operations and data being captured by the telephone system and not a focus on internal controls, we are considering this activity a diagnostic of the call center operations and data. This engagement falls under the consulting and advisory services definition due to the fact that the purpose was to improve operations.

We conducted this consulting and advisory service in conformance with the International Standards for the Professional Practice of Internal Auditing (IIA Standards) and with the Texas Internal Auditing Act (The Act). The IIA standards allow internal auditors to provide consulting and advisory services when the engagement has the potential to improve management of risks, add value, and improve the organization's operations, provided internal audit has no conflict of interest and internal audit personnel have no management responsibilities for the area in-scope. When providing advisory or consulting services, internal auditors are required to establish an understanding with consulting engagement clients about objectives, scope, respective responsibilities, and other client expectations. Additionally, the established scope must be sufficient to achieve the objectives of the engagement and must include consideration of relevant systems, records, personnel, and physical properties, including those under the control of third parties.

The Act defines internal auditing as an independent, objective assurance and consulting activity designed to add value and improve an organization's operations. Sec. 2102.003 of the Act defines consulting services as advisory and related client service activities, the nature, and scope of which are agreed upon with the client and are intended to add value and improve an organization's operations. Consulting services include counsel, advice, facilitation, and training.

Objectives

The agency is experiencing increased telephone call volumes. As a result, the hold time for customer calls to the agency increased and in many instances the calls were logged as abandoned because the customer calls could not get through. The Executive Director and leadership team implemented several actions to provide an interim solution for their customers to get information in a timely manner. However, these are not sustainable solutions.

TREC's Executive Director requested internal audit to complete an independent diagnostic on the call center's operations to determine if the call center has the proper tools and what potential short-term and long-term actions the agency can take to improve the call center responsiveness. As such, the objectives of this diagnostic engagement were:
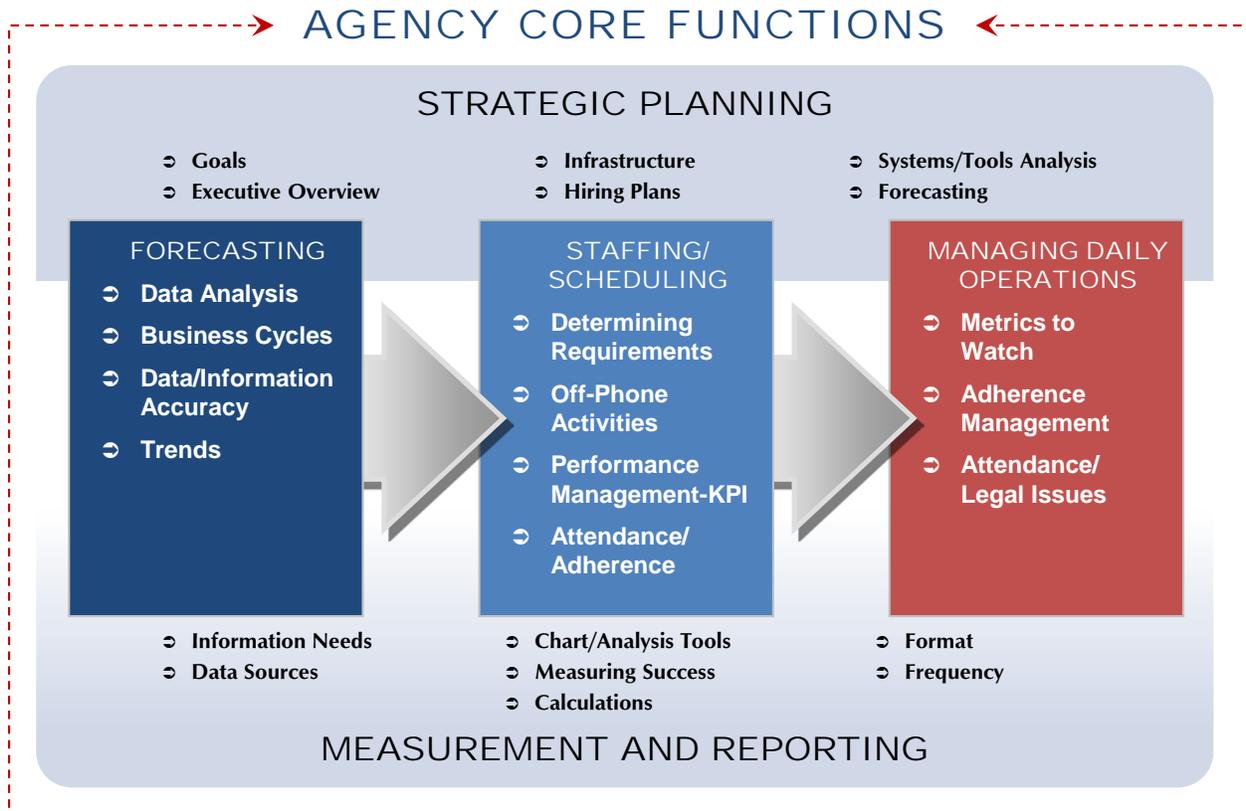
✓ Determine what data is being captured by the call center's current telephone system.
✓ Determine what standard reports are available for the call center's current telephone system.
✓ Identify data to capture or processes to be put into place that can assist the agency in identifying root causes for call center volumes.
✓ Provide suggestions on how the information should be provided to TREC leadership, Board and Commissioners in a more contextual and informative manner than what is currently being provided in the Board/Commission reports which is strictly volume and wait times instead of analytical/interpretive.
✓ Identify potential short term and temporary solutions that should be put into place to provide better customer service with respect to the call center.
✓ Identify long term considerations that the agency should consider for improving call center operations.

TREC Call Center Overview

Traditionally, call centers operate with the telephone as their main method of communication with customers. By nature, call centers are designed to handle a massive volume of calls. Generally call centers are used to handle customer service, technical support or sales. In TREC's environment, the Reception and Communication Service division operates the agency's call center and has direct interaction with TREC customers when they make contact with the agency to conduct their business. TREC's call center combined with their website is the face of the agency. These are the sources for customer first interactions. TREC's call center is the "problem solver" source for customers. TREC's call center volume of calls received increases when customers experience problems due to processes or outcomes in one or more of TREC's core functions; (1) issuing licenses, registrations, and certificates; and (2) handling customer complaints. RCS staff answer customer questions related to the agency's core functions in addition to answering questions related to the agency's website.

The RCS division's interaction with agency customers is a key metric that can be used to determine the effectiveness of the agency ensuring the core functions and website tools are being managed in an efficient and effective manner.

The following graphic depicts the management framework (governance) that should be followed to determine if the RCS division is operating in an efficient and effective manner while gathering information on the other divisions that provide the agency's core functions and the website.

AGENCY CORE FUNCTIONS

STRATEGIC PLANNING

- Goals
- Executive Overview

- Infrastructure
- Hiring Plans

- Systems/Tools Analysis
- Forecasting

FORECASTING
- Data Analysis
- Business Cycles
- Data/Information Accuracy
- Trends

STAFFING/ SCHEDULING
- Determining Requirements
- Off-Phone Activities
- Performance Management-KPI
- Attendance/ Adherence

MANAGING DAILY OPERATIONS
- Metrics to Watch
- Adherence Management
- Attendance/ Legal Issues

- Information Needs
- Data Sources

- Chart/Analysis Tools
- Measuring Success
- Calculations

- Format
- Frequency

MEASUREMENT AND REPORTING

Today's consumers expect the businesses they interact with to be present on several channels, and to offer consistent, qualified service on all of them. One of the actions that TREC recently implemented is a call-back system and an email response system. These activities are part of the overall business trend to enhance the customer experience through omnichannel customer support where the customers have numerous ways in which they can interact with the agency. Omnichannels include:

- ✓ Telephone
- ✓ Email
- ✓ On-line chat
- ✓ Text
- ✓ Direct website interface (self-service)
- ✓ Fax

The use of onmichannels as a means for customer service has led businesses to transition away from traditional call centers and towards contact centers. Contact centers are supported by mathematical models such as queuing theory and operations research. As a result, contact centers are considered to be a solution to solve a wide variety of customer support optimization problems.

Today's contact centers are equipped with features designed to distribute calls efficiently, in order to maximize the number of answered calls while keeping customer satisfaction high. An example of this is

interactive voice response systems that prompt you for information in order to direct your call to the correct agent and the on-line live chat features.

Currently the RCS call center uses the following information system/applications in their daily work. The Cisco systems are the same tools that serve as the infrastructure for contact centers.

- ✓ Cisco Finesse – An agent and supervisor desktop that integrates traditional contact center functions into a thin-client desktop application that is browser based.
- ✓ Versa- TREC's licensing system that is also used by the RCS agents to document calls by entering the activity and call notes.
- ✓ Cisco Intelligence – Allows the organization to easily report on relevant business data. This is the reporting module used by the RCS management team. The Cisco system's hub also has the capability to manage email, which is currently not used. This feature would enable the agency to establish key words to automatically scan each email that comes to customer service and then send a copy to the respective department to answer or automatically respond to the customer with a list of frequently asked questions.

In order for an organization to provide effective and efficient customer service for their call center or contact center operations the right people, technology and performance metrics must be in place.
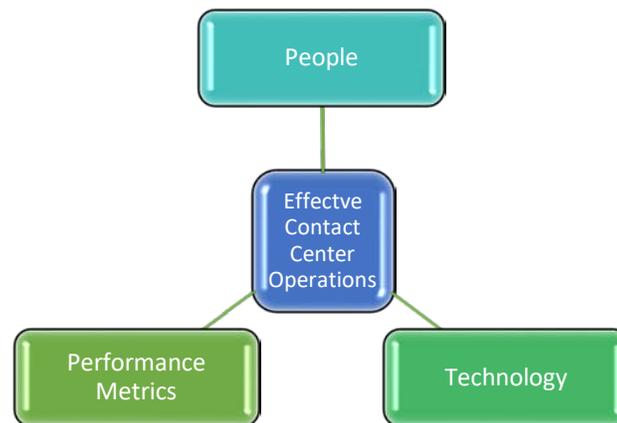
People – Call centers or contact centers must be staffed with employees that are patient, have clear communication skills, are creative and have the ability to stay positive. Creativity is needed to think outside of the box on how to quickly locate answers to customer questions and/or provide positive responses. The ability to stay positive is requiring staff to provide answers in a positive manner instead of negative. For example, instead of saying "we have over 2,000 application and we are unable to process your license right now" the agent could say "your application is scheduled to be reviewed within the next two weeks. If we have any questions with your application or we experience a delay we will contact you within this period. Otherwise you can expect to have you license by March 21, 2018".

Technology – Information systems and applications should be integrated to the extent possible. Call center or contact center agents should be able to access information quickly. Additionally, agents should have the right tools available to enable them to work as efficiently as possible.

Performance Metrics – Customer service should be measured by key performance metrics and realistic goals.

Diagnostic Summary:

Our diagnostic of the agency's call center functions, infrastructure and information determined that although the agency's current call system provides the tools needed to ensure that RCS can meet its business objectives and also provide statistical information that signals opportunities in other divisions the agency does not have adequate tools in place to enable the call center agents to quickly access information to answer customer questions. We also noted that the call center real-time operations are not transparent to the agency as a whole. Instead, the call center dashboards are maintained on the RCS manager and director's computers and summary management reports are distributed to TREC leadership.

In order for the agency to realize sustainable improvements in their call center operations the current tools (Cisco Finesse, Cisco Intelligence Center and Versa) will require improved configuration and an integration of TREC's current systems. The agency's method for accessing information will also need to be reconfigured. The call center tools also need to be supported with a progressive management style that empowers RCS staff to take immediate corrective actions to address customer call wait times.

We obtained and analyzed raw data from TREC's telephone system, reports generated through Cisco Intelligence and management reports provided by RCS. We noted that the highest call traffic percentages in April 2018 were due to calls related to inquiring about the status of applications, certificates and other status questions. Our analysis of the year-to-date and April 2018 telephone traffic determined the following:

Statistic	Year-To-Date	April 2018
Telephone call abandonment rate*	59%	57%
Average ring time before abandonment	8 minutes	4 minutes
Average hold time	16 minutes	14 minutes

* Industry standard is five to eight percent

These statistics demonstrate that the recent actions TREC has taken did result in some improvement. However, these actions required significant resources and are not sustainable for the long-term.

TREC is in the process of evaluating new call center application systems to implement. Our recommendations provided in this report should be considered prior to moving forward with a new call center application system. Our analysis determined that if the agency moves forward with implementing a new call center system into the current environment without first addressing their foundational issues, they could find themselves facing the same challenges that they are currently attempting to resolve. These recommendations are summarized below and discussed in further detail in the next section of this report.

1. Reconfigure the current call systems. TREC should obtain the service of a call center expert that can ensure the lines and applications are properly setup to maintain a monthly average of over

twenty thousand calls while ensuring the applications are only capturing data from agents that are actively logged into the system and available to serve TREC customers.

2. Provide the agency's executive team, Commission and Board management reports that provide an illustration of the call center activity on a daily, monthly, quarterly and annual basis. The reports should also be key performance indicator (KPI) driven with the cause and effect analysis to provide context to the data.

3. Ensure the Cisco Intelligence Center system's 25 standard reports that are available are configured so they can be reviewed and assessed for key information that is reflective of the active agents and call center traffic.

4. Establish key performance indicators and goals for the call center operations and individual staff members. Goals should be established for each KPI and then used as a benchmark to determine actual performance and when corrective actions or adjustments are required.

5. Add real-time call center activity visual displays throughout the office suites, starting with placing monitors on the call center area walls that show call volume statistics and other pertinent data that can be captured and displayed.

6. Configure the Versa and Cisco applications in an integrated process that is completed automatically by the systems or manually by the call agents.

7. Relocate the RCS manager to the call center area and provide the tools needed to ensure the team is being managed in a progressive environment with consistent oversight and monitoring.

8. Implement a progressive management environment that empowers the RCS manager and call center agents to take immediate corrective action to address call center volumes.

9. Develop a training program with materials and information to ensure new call center agents understand the overall process and proper customer interaction that can be conducted in a short time with the progression of the agent being supported by consistent oversight and performance reviews.

10. Consider holding call center agent training on weekends or evenings so that the impact on customer telephone calls is minimized.

11. Staff call center operations based upon call volume data analysis instead of tradition work hours. Improved reporting and proper call volume analysis should be used to develop the proper scheduling used to manage call center resources.

12. The website content should be configured so the agent has direct access without having to go through the internet or agency's intranet. TREC should consider developing an index environment or internal web environment.

13. Call center agents should be provided the full description of information needed to answer customer questions. If a customer is calling about information summarized on the website the call center agent should have access to the full information.

14. The agency should consider developing electronic indexes that can be quickly accessed by the call agent to answer questions. These indexes should be full documentation of statues, rules and guidelines needed to answer questions.

15. The agency should monitor and document frequently asked questions to determine how the information can be mass communicated to reduce call volumes.

Detailed Opportunities

Opportunity #1 - TREC's Call Center Infrastructure

Between July 2017 and April 2018 TREC's telephone system averaged over 26,000 calls per month. This volume requires a system that can accurately track and report the activity of active call agents and the management team.

TREC's current telephone line set-up and call interface may not effectively support the call volume traffic and the data creation needed by the call center. We observed the RCS call center operations on June 7, 2018 and noted that the current dashboard metrics reflected:

- ✓ 11 agents were logged into the system
- ✓ 5 agents were on the phone
- ✓ 22 waiting calls were in queue
- ✓ 6 agents were reported as idle.

Our follow-up with the RCS director noted that the six agents identified by the system as idle were trainees logged into the system and not actually assigned to answering telephones.

Recommendation:

On the surface it appears that TREC currently has the appropriate telephone system to meet its needs. However, the system needs to be reconfigured. TREC should obtain the service of a call center expert that can ensure the lines and applications are properly setup to maintain a monthly average of over twenty thousand calls while ensuring the applications are only capturing data from agents that are actively logged into the system and available to serve TREC customers.

The system should also be setup to ensure telephone traffic is routed and maintained to ensure better customer service. This should provide assurance that the abandoned calls are not due to a configuration that cannot maintain the current call volume.

Opportunity #2 - Data Resources and Reporting

Current Reporting

The agency's call center reporting consists of two custom reports; the monthly Queue Call Report and the total number of calls received. A few other reports are occasionally used to maintain internal metrics.

The reliance on these two reports has led to the development of a standard report communicated to the Commission and executive staff that only illustrates the volume of calls and other key attributes reflective of the monthly call volume with a comparison to previous fiscal years. These reports do not contain cause and effect analysis and contextual discussions of operations.

Call center activity should be reported based on monthly volume with a comparison with the year-to-date activity to illustrate progressive activity.   The activity should also be supported with a percentage

change to advise on increase or decrease of traffic, which should then be tied to resource management and the root cause of the call volume. This type of presentation would ensure a better understanding of the call center activity by executive management, the Commission, the Board and Legislature.

Recommendation:

Management reports and reports provided to the agency's executive team, Commission and Board should provide an illustration of the call center activity on a daily, monthly, quarterly and annual basis. The reports should also be KPI driven with the cause and effect analysis to provide context to the data. The information should be benchmarked against the current year performance to indicate changes, which can then be researched for root causes. This type of reporting will provide the management team the necessary information needed to determine business decisions.

Available Reporting

The Cisco Intelligence Center provides 25 standard reports and a dashboard that documents the basic call center key performance indicators (number of agents logged in, number of agents on the phone, number of agents idle and number of calls in queue).   When we attempted to generate each of these reports we encountered issues where many of the reports crashed or would not properly configure. These reports would ensure the agency has the tools needed to manage the call center while providing the required information needed to advise on call traffic.

We also noted that the call center agent current login and call line configuration of the call center does not allow management to use the dashboard effectively to ensure progressive management that would enable on-the-spot adjustments to be made based on call traffic.

The call center data resides on the Department of Information Resources (DIR) server. This is one aspect that is leading to the reports not running properly. The other is that the data does not appear to be properly configured.

Recommendation:

Work with DIR or a call center system expert to ensure the data is configured so that the Cisco Intelligence Center system's 25 standard reports that are available are configured and tested so they can be used for key information that is reflective of the active agents and call center traffic.   These reports provide the necessary information needed for the progressive management of the call center while providing key data that can be summarized to illustrate the performance of the call center and the analysis of call traffic.

The following Cisco Intelligence Center reports were identified as key reports that can currently be generated even though the processing time is slow.

Report Name	Data Captured
Dashboard	Waiting Calls Longest Call in Que Agents Logged in Agents Talking Agent Ready Agent not on a call Agent in After Call Agents reserved Phone lines being used Agent Identification Current State of Agent Duration Reason Code
Traffic Analysis Report	Total Incoming Calls Average Calls per hour Peak Calls by Hour Peak hours Call Duration
Agent Detail Report	Agent ID Extension Call Start time Call End time Call ANI (originating number) Line Used Talk time Hold Time Work Time
Agent Login/Logout time	Report currently fails to run

Key Performance Indicators

Currently, the RCS division and TREC have not developed goals and key performance indicators that can be used to measure the performance of the call center while providing insight on the root cause of telephone call volume. The lack of KPIs and not understanding the data that can currently be retrieved has led the RCS management to make decisions based on "what we think is happening" rather than on solid data that provides the insight needed for effective decision-making.

Instead of managing by assumptions, the RCS call center should be managed through data that captures and measures key performance indicators that are relevant to effective management of the call center and the agency.

Recommendation:

The agency should incorporate "best practice" call center key performance indicators along with other indicators TREC determines as important into the RCS call center operations. While we discuss KPIs related to customer telephone calls, KPIs and goals also should be developed for each customer contact method as TREC moves more towards a contact center function instead of the traditional call center function.

Goals should be established for each KPI and then used as a benchmark to determine actual performance and when corrective actions or adjustments are required. Once the KPIs are established they should be communicated to all agency staff. The RCS management staff and the call center agents should also understand their performance is measured on the established key performance indicators and goals.

When establishing KPIs and goals it is important to ensure that what is being measured is important to the agency and results in positive impacts for the customer. The following are examples of call center best practice KPIs that TREC should consider:

- ✓ RCS Calls Received – The number of customer telephone calls received.
- ✓ Service Level/Response Time – The percentage of calls answered within a predetermined number of seconds or minutes.
- ✓ Abandonment Rates – The number of callers that hang up before they connect to a call center agent.
- ✓ Average Handle Time – The average amount of time spent on each call, including administrative duties associated with the call.
- ✓ First-Call Resolution – The ability to resolve the customer's question or concern on the first call.
- ✓ Percentage of Calls Requiring Call Backs – The percentage of customer calls that were not able to be answered in a timely manner and were requested to be called back instead of waiting in queue.
- ✓ Calls Handled by Call Center Agents – The average number of calls handled by each call center agent.
- ✓ Traffic Analysis – Call volume by day and time of calls received.
- ✓ Percentage of Calls Requiring Transfer – The percentage of customer calls received that the initial call center agent is not able to answer with available information.
- ✓ Longest Call in Queue – The longest wait time that a caller is on hold waiting to speak with a call center agent for the first time.
- ✓ Call Type Based on Agency Core Function - The customer's purpose for calling (categorized into predetermined buckets).
- ✓ Customer Satisfaction – Customer's measure of their satisfaction with the call's service response.
- ✓ Quality Monitoring Scores – The observation of live or listening to recorded call by evaluators for the purpose of rating effectiveness.

These key performance indicators along with TREC's key performance indicators should be reported daily, monthly, quarterly, and annually to the call center team and executive management with a summary provided to the Commission and Board. All deviations from the established KPI goals should be explained with data captured and placed into context. For example, the number of telephone calls increased as a result of changes made to the licensing process. In order to do this, the reason for customer service contact (telephone calls, emails, etc) must be captured and categorized. Below is an example of how the KPIs and goals would be reported.
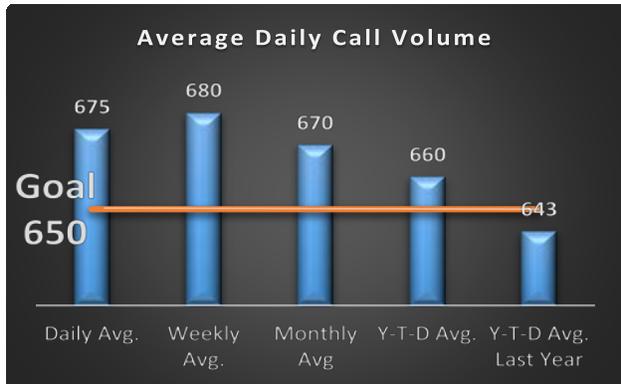
Analysis:

The number of individual seeking real estate license increased this year from 10,000 to 13,000.

Analysis:

The agency is short two call center agents in addition to the increase in the number of individuals seeking a real estate license.

Analysis:

A new website was implemented in January. Calls for login assistance are now decreasing due to the ability for customers to reset passwords themselves.

Analysis:

Call center agents have received additional training on frequently asked customer questions. This is reducing the time required to search internal documentation for these answers.

Note: The numbers presented are examples only and not based on actual data and operations.

Maintaining call center dashboards on the RCS managers' computers is not a transparent and effective way to manage call centers. Instead, TREC should also add real-time call center activity visual displays

throughout the office suites, starting with placing monitors on the call center area walls that show call volume statistics and other pertinent data that can be captured and displayed. For example, call center agents and the telephone system could be capturing and displaying the caller's purpose for contacting the agency into pre-determined classification buckets. The larger the screen the better. This will enable any staff member to take notice of call center activity and take appropriate action.

Opportunity #3 - Systems Integration

Currently TREC's Cisco systems are not interfaced with TREC's Versa licensing system.

During our observation of the call center operations we noted that the call center agents have the ability to enter information into Versa while the call is being conducted or shortly after the call. The call center agent has the capability to enter the contact type and description of the call into the Versa notes. However, we observed that this is not consistently performed for all calls received. We also noted data entry into Versa would need to be configured to capture an entry related to a call type choice from a drop down selection, so the information could be captured instead of relying on the current spreadsheet that was recently implemented but not consistently used.

The integration of TREC's Cisco systems with TREC's Versa licensing system would provide the agency the capability to capture the type of calls coming into the call center as well as the documentation of call notes. This integration can be performed in a manual or automatic environment. The best scenario would be for Versa to be able to capture the call number, caller information, reason for call and call notes summary automatically by developing an interface between systems but the same could be done manually.

The combination of the Versa information being captured with the key performance indicator information provided by Cisco would provide RCS the information needed to ensure their business objectives are being met while providing indicators of challenges and opportunities in other divisions performing agency core functions.

Recommendations:

Configure the Versa and Cisco applications in an integrated process that is completed automatically by the systems or manually by the call agents. Ensure that Versa is configured to capture the key information of call types and call notes. Implement a reconciliation process for the RCS manager to complete to ensure that the data is being maintained and entered by the call agents.

Once VERSA has been configured to capture key attributes decided by TREC, reporting can be developed that combines the reporting from CISCO and Versa and provide a true illustration of the call center activity.

Opportunity # 4- Call Center Management

During our call center observation and interviews we noted processes and general management that do not support the development of the call center while ensuring consistent monitoring and oversight is completed based on supporting documentation.

Management Style and Training

Management of call centers are usually conducted with a progressive management style that enables all staff to address opportunities as they occur with call traffic or customer interaction. This practice allows the call center to respond to call volumes and customer service issues immediately, which reduces negative interaction with their customer base. These practices are usually conducted with the manager located with the call agents, measurement criteria, real-time activity visual displays and daily briefings of key performance indicators.

We noted that the RCS manager is not embedded with the call center agents and does not have a properly configured traffic call activity dashboard accounting for only active agents. The RCS manager does listen to calls through the phone system but this is only performed on a sample basis with no formalized criteria that can be used to measure an agent's performance. We also noted that the agents are not provided any information or documentation of performance expectations when an issue is noted or when an annual review is conducted.

The RCS division experiences significant employee turnover as is common with all call center and contact center operations. TREC call center agents do not handle customer telephone calls until they have received extensive training on TREC operations. This training is held during the workday and results in the new employee and the trainers not being available to answer customer telephone calls.

The lack of a progressive management style that provides adequate tools and empowers the RCS manager to take quick actions coupled with the over-reliance on training does not provide the agency the opportunity to address needs as they occur and delays the availability of the call center agent to respond to customer telephone calls.

Recommendations:

The training developed by the RCS management team should consider both customer service interaction and cell center agent's availability. For example, instead of training new call center agents on all TREC functions, the new employee can receive training on TREC's basic call center operations such as how to answer the telephone, how to locate information and how to reset passwords. The new employee can then begin answering customer calls and receive either on-the-job training or a series of short session additional training segments. A progressive management style supports this type of basic training with consistent follow-up that can support on- the- job training to ensure that the RCS division has available call center agents to address the agency telephone call traffic.

1. Relocate the RCS manager to the call center area and provide the tools needed to ensure the team is being managed in a progressive environment with consistent oversight and monitoring.

2. Ensure the RCS manager has the authority and developed criteria to measure the performance of the call center agents.
3. Develop a training program with materials and information to ensure new call center agents understand the overall process and proper customer interaction that can be conducted in a short time with the progression of the agent being supported by consistent oversight and performance reviews.
4. Consider holding call center agent training on weekends or evenings so that the impact on customer telephone calls is minimized.

Staff Scheduling

Currently, TREC's call center operational hours and staffing are based upon traditional work hours instead of data analysis to determine telephone call volumes by time of day and days of the week. TREC's customers are in positons that they may need to have customer support available to them during non-traditional hours.

Recommendations:
Call center operational hours should be based upon when customers most frequently need the services. As such, TREC's staffing of their call center operations should be based upon call volume data analysis. Improved reporting and proper call volume analysis should be used to develop the proper scheduling used to manage call center resources.   If done properly the management team should be able to identify trends and patterns that will ensure the proper resources are available for the call center at all times.

RCS Division Technical Capabilities

The configuration of call lines, application integration and report development requires an individual(s) with technical expertise in call center system technology and understands a call center configuration and needed resources. Currently TREC does not have the in-house technical expertise to ensure their call center lines and software are configured correctly. Instead, the agency is reliant on the Director of RCS to complete technical processes and call center configurations although this is not an area of expertise for the individual holding the position.

The continued reliance on the RCS director to provide insight on specifications and infrastructure will lead to the agency's current environment, which does not serve the needs of the agency or its customers.

Recommendations:

TREC should reduce the expectations of the RCS director to understand technical setups that require call center industry expertise. Instead, the current call center environment should be evaluated by a person with call center expertise. The agency should consider sourcing a consultant that can work with DIR, TREC management and other agencies with call centers to determine "best practices" and supporting

applications used by other Texas agencies. The agency should then use the evaluation to develop a strategic plan for the improvement of the call center addressing the current infrastructure and the development of current or new support applications. The plan should include what type of actions should be taken with assigned responsibility. TREC should also consider hiring an individual that has the technical knowledge and understanding of call center technology and resource requirements as a long-term option.

Opportunity #5 – TREC Information Sources for Call Center Agents

TREC's call center agents are reliant on the agency's website to answer customer questions.   We noted two key areas that affect the agency's ability to serve their customers effectively and efficiently.

1. The agents are reliant on the TREC webpage performance and the posted information, which is limited due to website space availability.
2. The configuration of the website was developed for the TREC user experience and is not a consistent tool that should be used as the primary information source for the call center agents.

Recommendations:

1. The website content should be configured so the agent has direct access without having to go through the internet or agency's intranet. TREC should consider developing an index environment or internal web environment.
2. The configuration of the call center should also ensure it has the available resources needed to process information quickly through the TREC environment when accessing records etc.
3. Call center agents should be provided the full description of information needed to answer customer questions. If a customer is calling about information summarized on the website the call center agent should have access to the full information.
4. The agency should consider developing electronic indexes that can be quickly accessed by the call agent to answer questions. These indexes should be full documentation of statues, rules and guidelines needed to answer questions.
5. The agency should monitor and document frequently asked questions to determine how the information can be mass communicated to reduce call volumes.