



## **Blueprint for Call Center Success: Building an Effective Organizational Structure and Team Environment**

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A call center may be as small as 5 people and as large as many thousands. Some are small subsets of a larger institution and others make up the bulk of the company's staff. All have an organizational structure and understanding that structure and potential alternatives will help you in finding the most effective one to meet your operation's current needs while preparing for the changes that are just around the corner.

There are three basic types of organization that we see in call centers. The first is the hierarchy (or bureaucratic form) in which there is a pyramid-shaped organizational chart with the Call Center Manager at the top and the agents at the bottom. There are supervisors and supporting managers between these. The typical ratio of agents to supervisors is up to 20 to 1 and the manager generally has up to 15 direct reports including the trainers, quality assurance staff, workforce planners, and others in addition to the supervisors. In a large center, there might be another layer with the shift managers, product or process managers, and other managers above the supervisors, maintaining the appropriate reporting relationship and ratio. This type is best where command and control are essential and where leadership is strong and rules are clear.

The second type of organization is more flat than the hierarchy. It has larger groups and fewer layers, minimizing the number of people between the top person and the bottom ones. This style of organization is designed to be faster and more nimble when changes are required and tends to push the authority down the organization along with more responsibility. Flattening the organization is best when authority and responsibility can be closely aligned throughout the organization chart, but some command and control is still required. Fixed teams can work well in this organization as well.

The third type was popularized by the Japanese a couple of decades ago and it is founded on teams. Each team is self-managed to a large extent and contains all of the necessary disciplines and capabilities to accomplish the tasks assigned to it. Teams can be any size, but tend to work best when they do not get so large as to make communications a challenge. But with today's email, voice mail, and collaborative support tools, the sizes can easily grow to multiple work sites and even international teams. Teams can be realigned and personnel shifted among them as the projects and processes demand. This type of organization is best for organizations that are project-oriented or where a significant percentage of the staff is specialized.

There is a fourth type of organization mentioned in most texts on organizational design called the matrix. In this type of organizational structure, multiple managers share responsibility for the same staff, each focusing on a specific task, specialty, or activity. However, we rarely see this in the call center.



As we know, the call center is in a constant state of change, reacting to the latest business demands, customer expectations, and technology developments. Current trends in the industry include the following:

- Global – More centers are being placed outside the country of the company’s headquarters in an effort to provide follow-the-sun services, and lower costs.
- Diverse – In addition to meeting customer demand of providing services in multiple languages, organizations are striving to make their workforce more diverse. Learning about different cultures and providing a workplace that respects diversity is essential to success. This includes such mundane adjustments as ordering food of all types when lunch is provided in the center.
- Flexible – Centers need to be able to adjust to fluctuations in contact volume and patterns, implementation of new technology, and evolving customer expectations as well as respond to the needs of their own workforce. Adapting may include use of telecommuters, part-time personnel, and/or outsourcing calls.
- Flat – There is a trend toward flatter organizations as described earlier, in order to empower staff to allow them to be more flexible and effective in meeting changing demands.
- Networked – Multiple sites are typically linked together to provide better coverage, lower costs, and greater flexibility, but at a cost of complexity in managing the whole and the parts effectively. With outsourcing becoming more common, linking to partner center(s) is part of the process, as are alliances with partners and co-opetition.

Along with these shifts within the center, we see a movement within organizations to view their call center as a revenue source rather than just as a necessary cost. While this may not be direct revenue from sales booked in the center, the influence the center has on buying behaviors and on customer retention is not lost on senior management. This requires the center’s managers to develop and communicate the total value of the center and to interact with the other parts of the organization as an active member of the team. This is a two-way street so, for example, when you ask marketing to give you more warning about upcoming campaigns for forecasting purposes, don’t be surprised when they ask you to gather more data for their customer analysis process!

In considering the optimal organizational structure for your operation, it’s important to also consider the significant trends in the call center industry, as many of these will have an effect on which structure will work best. Some important challenges for call center organization include the following:

- Growth of non-call transactions. As more customers contact you via email and web-based transactions, the call center will require new skills and technologies and this evolution will need a structure that can respond to the challenge. Call/contact blending. Many centers are attempting to maximize agent productivity by blending all media types and contacts together. This requires multi-skilled staff and complex management tools to ensure all goals are being



- met. Most centers find that shifting staff from one media to another in blocks of time is more effective than true blending on a per-contact basis.
- Growth expectations. While the 1990s was a period of unprecedented growth, the expectations moving into the new century have been tempered somewhat by the declining economy. Adjusting from the fast-growth thinking of the past to a more sober forecast will require some retrenching in the planning processes.
  - Hours of operation. There has been a definitive move to 24 X 7 operations in the last few years, with call centers committing to providing round the availability to customers. This is one of the areas being re-evaluated, however, as a way to trim costs in slower economic times.
  - Speed of service. The goal for answering phone calls is generally expressed in seconds, while email goals are often in hours or even days. But customer expectations are growing and email response times will soon need to approach the phone speed of answer goal. And an automated response is not enough to meet most customer expectations, any more than a recorded voice mail will suffice for phone calls.
  - Quality of Service. It isn't enough to be fast. Customers want to have their issue resolved in one contact. If you are not measuring effectiveness of response yet, you will need to do so soon.
  - CRM Initiatives. Focus on building customer relationships will bring more technologies and shifting priorities to the call center. New goals and incentives will need to be aligned and ties with other departments strengthened. And the trends toward forcing customers to self-service to save money may give way to encouraging more interaction to maximize relationships.

So what are the implications of all the above factors on your organizational structure? Specialization is now more prevalent with skill-based routing and unique media requirements. This is a challenge for recruiting, training, and scheduling. There is a stronger dependence on the IT department as the systems and applications proliferate and manual functions become more unrealistic.

Agent group structure will include specialists, generalists, and blended teams. Non-traditional working arrangements will make more sense than ever pushing for more part-time, telecommuting, and outsourcing. And supervisory roles will need to shift as well. Should a supervisor be expected to handle a team who handles a range of media, products, shifts, with personnel in-office and at-home? It looks like it may be time to move the role of expert for escalated calls to one team and look to another to provide coaching and mentoring. In fact, the concept of self-directed work teams may be the best choice in some centers.

As you think about retention of personnel, have you provided an appropriate career path for everyone? All front-line staff won't want to be multi-skilled and frankly, some simply won't have the capability. But you'll probably want to maintain a core of personnel with depth of skill in each area as well as the generalists. This means more than ever that "one size does not fit all".



When the economy permits, all call centers will be recruiting again. Think about the skills you will need in two to four years, not just the ones needed now. If you are going to retain these new hires, be sure they can grow into the position as it will likely evolve.

It is clear that there is no one, single right answer to what organizational structure works best for call centers today. Just like every call center has different technological needs, it's just as true that each call center is unique with respect to what organization structure will work best. To find the "just right" structure for your operation, talk to your peers, read the trade publications and join user groups to find out what is being tried elsewhere and might work well for you. Fine-tune these ideas with pilot projects and experiments. But be aware, in today's rapidly changing business world, every organization's structure must evolve with it in order to survive and succeed. **About the Author....**

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