



**SFU** SIMON FRASER UNIVERSITY  
LEARNING FOR THE WORLD

## Implementing a contact centre

Why, how, and what's happened

ARUCC 2012  
June 28, 2012

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## Introductions

- Patrick Loughheed  
– Director, Business & Policy Analysis
- Jess Wong  
– Assistant Registrar, Registrar & Information Services, Burnaby Campus
- Kate Ross  
– Registrar & Executive Director, Student Enrolment

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## Context & History (I)

- SIS change to PeopleSoft in 2003
- GoSFU group created as a technical support line
- Over time, many calls to Burnaby centralized to a single number
- By 2006, this had led to...

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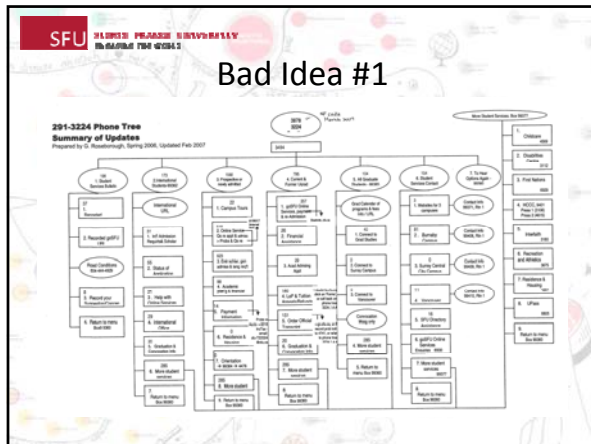
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- Departments run away from a centralized number
- By 2010, everyone was doing their own thing

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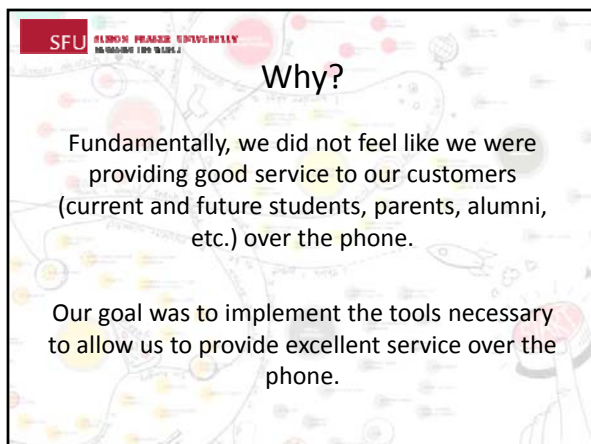
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### Pre-Project Phone Numbers (I)

- Registrar & Information Services
  - 3 campuses, 3 numbers
  - Vancouver and Surrey numbers act as campus mainlines
- GoSFU
  - 1 number
  - “Catch-all”
  - By 2010, the Burnaby RIS number simply pointed here

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### Pre-Project Phone Numbers (II)

- Admissions
  - Internal transfer only
- Recruitment
- Records
  - Direct, but unpublished
- Financial Aid & Awards
- Student Accounts

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### Pre-Project Staffing (I)

- Admissions and Records
  - Manned by 1 staff member in shifts
- Financial Aid & Awards and Recruitment
  - Hunt lines
- Student Accounts
  - Number goes direct to 1 staff member’s desk

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## Pre-Project Staffing (II)

- GoSFU
  - Student staff, union grade 4
  - 3 month contracts with a mandatory week off between contracts
  - Anywhere from 1-6 on phones at a time
- Registrar & Information Services
  - Permanent staff, union grades 8 & 9
  - Generally 1 on phones at a time
  - Also man the front counter

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## Pre-Project Phone System

### No metrics!

- Can't be proactive
  - Scheduling staff
- Can't be reactive
  - Dealing with sudden peaks or valleys
- Can't see info on who called, why, when...

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## Pre-Project Phone System

### In-house phone systems are built to deal with occasional calls

- No break between calls when there's a queue
  - Can't do SIS or other work to finish a call
  - Can't take a breath between calls

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**Pre-Project Phone System**  
**Forces staff to multi-task**

- Contact systems don't know about one another
  - Phone
  - Email
  - Chat
- Can't concentrate on a single interaction

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**Pre-Project Phone System**  
**Can't...**

- Offer callbacks
- Record calls
- Easily change prompts
- Easily create bulletins

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**Staff reflections on our old phone system**

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## Genesis of a Project

- Identified as a serious problem for several years
- Had been exploring new systems
  - Demos, etc.
- Fell into a time when we had some money and some capacity

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## Building Requirements

- Spent 6 months talking to...
  - Vendors
  - Other institutions
- Ended up with

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## What We Didn't Want



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## Finding a Product

- Went to a Request For Proposals
- 8-10 vendors expressed interest
- 4 submitted proposals

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## Types of Products

- In-house
  - This is the traditional system
- Hosted (cloud)
- Outsourced

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## Our Choice

**telax**  
Hosted Call Center

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**Rethink 55**  
Architecting Customer Experiences

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## Implementation

- Chose Telax & Rethink55 in May
- Started the project July 18
- 3 days of on-site data gathering in mid-August
- Development complete mid-September
- UAT, training, and evangelizing in October
- Live on Hallowe'en!

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## Our team

- Pat & Al Wiseman, project sponsors
- Dorothy Paukste, project manager
- Darlene Terry, business analyst
- Kyle Woo, co-op student
- Jess & 7 other business area managers

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## Choosing a Voice

A cartoon illustration of a person with black hair, wearing a red and white striped shirt and blue and white striped pants. They are holding a megaphone to their mouth. The background is a white space filled with various icons and diagrams, including a rocket, a lightbulb, and a hand holding a sign that says 'START'.

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## Creating a Phone Tree

- Two questions
- What kind of caller
  - Future student
  - Current student
  - Other (alumni, parent, etc.)
- What can we do for you
- When possible
  - What's your student number?

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## What We've Done

- Phone only so far
- One number (99% of calls)
- A SIMS popup
- Offer callbacks
- Proactive and reactive
- Allow areas to cover each other off
- Created a better experience for all callers

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## Demo!

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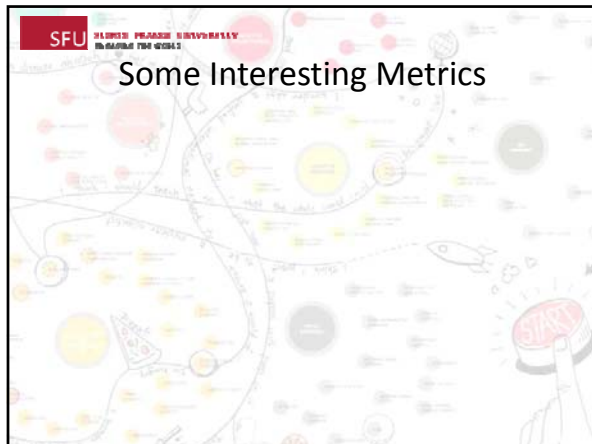
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### What We Still Need to Do

- Address our staffing issues
- Roll out the post-call survey functionality
- Roll out instant message/chat
- Figure out how to deal with email
- Expand?
- Deeper integration with our SIS

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### What the System Isn't

- A silver bullet
- A customer relationship management system
- A fix for staffing issues
  - Might even make them more glaring

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### Questions?

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