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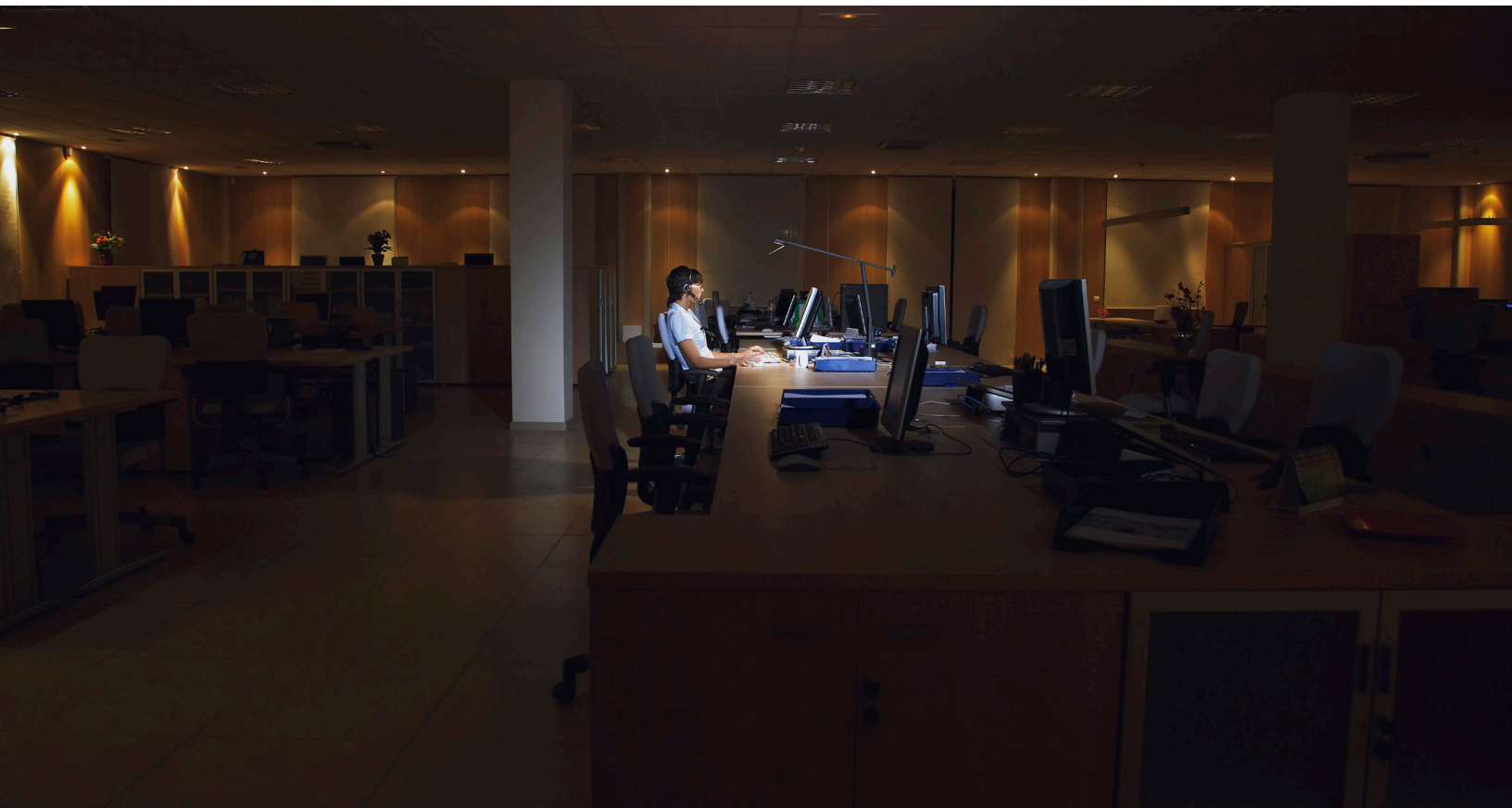
Customer-care organizations: Moving from crisis management to recovery

The COVID-19 pandemic calls for a focus on six imperatives to rapidly adapt to this new environment.

by Jeff Berg, Eric Buesing, Vinay Gupta, and Raelyn Jacobson

April 2020

As the COVID-19 pandemic spreads around the world, companies across all sectors scrambled to stabilize operations and institute new guidelines to protect the health of their employees while maintaining service to their customers. Contact centers moved with unprecedented speed: within days, some companies had shifted thousands of workers to remote locations or enabled them to work from home. Others quickly experimented with staggered shifts. Through it all, contact centers sought to maintain connections with customers at a time when engagement was crucial.

Now, customer-care organizations are shifting their focus to meet the rapidly evolving needs of their employees and customers. At the top of the list is creating resilient, coordinated business-continuity plans to reflect the new reality. In the past, business-continuity plans tended to focus on technology resiliency, but in our new world, plans will need to prioritize operational resiliency—such as flexible working models, geographic redundancy at the city rather than country level, and virtualization of key processes, security protocols, and policies.

By focusing on building new capabilities and flexibility, companies can emerge from the pandemic with increased productivity and resilience.

Six imperatives for customer-care organizations during a crisis

Our ongoing discussions with customer-care organizations have uncovered a variety of actions that have proved particularly effective in responding to the crisis. We have grouped those actions into six imperatives that span strategy, operations, technology, and culture. Many of these imperatives will be familiar to customer-care organizations; some might already be priorities, while others are more aspirational. However, the pandemic has elevated all of them to a position of critical importance in the near term.

Continue to shape customer expectations
As the crisis has unfolded, customer-care organizations have revisited and implemented practices and policies that help customers feel safe and cared for in times of need. Many companies sent out thoughtful, personal messages from leadership in the days and weeks after the onset of the pandemic. Maintaining this engagement in the channels where customers are looking for information is critical to sustaining the relationship and addressing the most common top-of-mind issues. In banking, for example, customers may be looking for reassurance that they will have continued access to their money so they can pay their bills. They will also need a clear understanding of financial protections and the options for making emergency payments.

Proactive communication can reduce customer contact volumes by resolving common triggers for contact before they arise. In parallel, agents must be kept updated on trends that might affect the landscape for customers. Customers may be on edge because of the disruption and uncertainty around their own situation, so companies are training agents to be more empathetic in their interactions with customers by using strategies such as in-the-moment coaching. In addition, when service representatives are unable to perform basic transactions because of systems outages or heavy call volumes, they need to provide an explanation, acknowledge the inconvenience, and refer customers to the proper self-service channels.

Reinforce culture and connection with employees
During the next several months, workers will be juggling a host of personal and professional issues. Customer-care leaders are devoting extra time to understanding what agents are going through and providing additional flexibility and support. For example, they might offer later starts or earlier ends to shifts, longer breaks, or more virtual coaching sessions. To replace traditional management techniques that relied on workers being in the same space, customer-care leaders are implementing virtual meeting tools and communication channels. When an employee gets sick, managers should not only demonstrate genuine empathy but also make sure that the worker is aware of available support. For the workforce in general, leaders must communicate the measures they are taking to protect employees, such as additional sanitizing and paid sick leave.

Organizations with strong cultures often sustain those environments through in-person activities such as putting up posters, team events, and visits from senior management. Supervisors will need to translate all processes, tools, and support from brick-and-mortar locations to a remote environment to ensure that agents experience the same immersion in the organization's culture. To build community and maintain a cohesive workplace, organizations can create new avenues for social connectivity throughout the day. Methods such as virtual team huddles and meetings, team events, and intra- and interteam competitions offer a much-needed break from solitary work while boosting camaraderie. Organizations can also double down on building and maintaining community through remote competitions (such as quizzes and contests) and other engagement activities.

Establish and maintain a COVID-19 control room

As part of the initial response to the COVID-19 outbreak, many companies created crisis nerve centers—agile, coordinated bodies that bring together staff members with crucial organizational skills and capabilities. The nerve center monitors developments related to the COVID-19 pandemic, supports decision making, and coordinates the rapid response. Since the pandemic will continue to directly affect contact centers, companies should consider creating a control room within their customer-care organizations. This entity would address the impact of the crisis on the contact center and report up to the company's central nerve center.

The customer-care control room should be guided by a cross-functional team including members from both front- and back-office functions. To facilitate clear decision making, two to three contact-center leaders should be designated as decision makers.

The control room's role can evolve as the situation changes in the months ahead. Daily developments often have a direct impact on customer demands and incoming calls, so the control room can track these trends to inform scenario modeling and capacity planning. And in the event of recurring waves of COVID-19 or other disruptive events, the control room can quickly scale to meet the challenge.

Scale an effective remote-working model

The days of a fully on-site or local workforce may be over. In response, many companies are preparing for a workforce made up of both remote and on-site employees. The maturity of a customer-care organization's remote-working initiative will shape its priorities in the near term. Companies with the appropriate capabilities could focus on scaling quickly by ensuring that agents have the necessary tools and resources to handle calls from home while maintaining customer data confidentiality. Organizations should communicate clear policies and expectations to all employees during the expansion effort.

Many organizations without remote-working capabilities have started to test infrastructure by introducing remote working for a percentage of in-house agents, such as those who handle non-voice channels. One IT help desk, for example, spent three days experimenting with remote work for 300 employees. Each day, about 20 percent of those 300 employees worked from home and reported back on the issues they faced, such as bad internet connectivity or disruptive children or pets. Once a remote-working capability is up and running, companies can then focus on optimizing norms across technology, security, and management to increase productivity and ensure employee engagement.

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Still, organizations will need to reassess many processes, such as onboarding for new employees. To keep new agents engaged, managers can break down training sessions into modules and incorporate interactive elements such as multiple surveys or quizzes. Some organizations are also reporting more frequently on applicable key performance indicators and using advanced analytics to improve quality control.

Aggressively expand the adoption of digital self-service approaches

The COVID-19 pandemic has increased not only overall customer volumes but also the number of new customers using digital channels. For example, online orders for food and other items are up 15 to 20 percent in some affected countries, leading to an increase in customer-service requests.

Companies have deployed a range of responses in an attempt to distribute demand. Some companies, particularly in the airline and consumer goods industries, have been advising customers of long wait times, offering callback options and optimal call times, and steering them to available digital channels.[1] Customers have responded by shifting to self-service options that may have seemed too complicated in the past. In parallel, companies can quickly expand peer-to-peer community forums and rely on them to manage customer inquiries. Gig-economy workers and brand ambassadors on social media could be enlisted to create forums and online videos detailing how to complete basic self-service transactions.

Companies can also take a range of actions to manage the influx of recent digital adopters, including helping them adjust to digital service channels. For example, a company might create a series of new landing pages about its COVID-19 response along with clear FAQs on creating an online account and conducting self-service transactions.

When customer volumes spike in response to updated policies or developments on COVID-19, customer-care organizations can quickly tweak digital self-service offerings to accommodate new requests. Companies could identify a critical set of transactions, such as fraudulent charges or emergencies, that customer-service representatives will continue to perform. One international bank, for example, informed customers through its interactive voice response (IVR) system that its contact centers could not accommodate certain types of nonemergency calls. Organizations might also consider reallocating resources and upskilling their workforces to support high-volume digital channels such as chat and email.

Ramp up workforce flexibility

Companies can take several actions to deal with spikes in demand and disruptions. To manage customer inquiries during the COVID-19 crisis, companies have adjusted shift structures—implementing everything from staggered shifts to a recalibrated mix of part- and full-time workers to direct hiring of additional work-at-home agents. As some physical locations have had to close, newly available service workers—such as knowledgeable branch tellers or store employees—can step into contact channels, particularly phone. These new agents can be brought up to speed quickly with e-training on simple call topics and non-voice channels. During downtime, customer-care organizations can create additional flexibility by upskilling employees on new queue or channel skills.

Customer-care organizations could also consider spreading their workforce across multiple sites, using empty offices or meeting spaces to support physical distancing. Countries that are home to large business processing outsourcing (BPO) companies are experiencing disruption and often lack the infrastructure to enable agents to work from home. Companies can work with their BPO partners to quickly ramp up their remote work capabilities—for example, by searching in low-infrastructure areas for suitable alternative workplaces, such as offshore captive centers, bank branches, hotels, and business centers. Even with these efforts, BPO companies may struggle to operate at full capacity, potentially creating long wait times for their clients' customers. Companies can prioritize certain categories of requests to help BPOs run at near their service-level agreements.

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[1] Sarah Krouse and Sharon Terlep, "Customer calls to companies rise amid coronavirus, but operators aren't standing by," *Wall Street Journal,* March 29, 2020, wsj.com.

Leaders will embrace new ways of working

This fast-moving pandemic is forcing companies to adapt their operation strategies and problem-solving approaches to a new reality. Customer-care organizations that follow these six imperatives will be well on their way to increased resilience and flexibility. However, the most successful organizations will also embrace the following three approaches.

Enhanced business-continuity planning. The business solutions that help companies manage this pandemic may not be effective in other situations, such as natural disasters. In addition, companies should be prepared for scenarios including recurring or seasonal outbreaks of COVID-19 even after the pandemic abates. Business-continuity planning must become more frequent and more rigorous in response to the new normal. Customer behavior may continue to shift to digital channels, leading to increased e-commerce traffic and self-service even after stores reopen. The types of incoming calls will continue to change: while volumes may decrease, complexity will likely remain high as customers resolve simple issues on their own even as new types of requests arise. Strategies to enable remote work and increase flexibility should take technology and talent into account and incorporate resilient location plans.

Rapid iteration and experimentation. The leap in digital adoption across customer demographics and the sense of urgency around customer needs provide an opportunity to experiment. Instead of aiming for perfection, companies should implement a true test-and-learn mentality that enables them to develop and deploy changes quickly. Every organization is reaching out proactively in response to the pandemic, and customer tolerance for this communication has increased. Now is the time to ensure that channels of communication remain open. Companies should keep customers informed about ongoing efforts to improve support through remote services. This open dialogue can also enable customers to provide valuable feedback.

Targeted investments. Investments made during this crisis will have lasting impact. Customer preference for digital channels and quick response times was on the rise even before COVID-19, and this trend will likely accelerate when the situation settles. Leaders will invest in people, processes, and technology that facilitate better agent support, self-service, employee engagement, and automation of simple tasks. Enhanced technology solutions need to be flexible enough to support future innovations. For example, companies could consider investing in dynamic technologies that are easy to deploy, such as web forms, chatbots, and IVR updates. Larger initiatives, including telephony replatforming and complex process automation, may be deprioritized in the near term. But as long as investments allow for flexibility, they should help set the stage for future innovations and the rapid development of infrastructure within the organization.

Customer-care organizations should also explore investments in data and analytics to support a range of applications. The COVID-19 crisis has demonstrated the difficulty of predicting call volumes during disruptions. With a better understanding of changing patterns in call types, companies could accelerate the reskilling of employees to quickly adapt to emerging customer needs. Analytics could also give managers insights into the productivity and service quality of a remote workforce by using speech or text analytics. Finally, companies could use data on customer behaviors to build a segmentation strategy for repeat callers, especially in centers experiencing significant increases in call volume.

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If the six imperatives outlined here have become the new table stakes in customer care, the next-level strategy calls for organizations to manage business continuity, embrace experimentation, and make targeted investments. Organizations will need to adopt all of these tactics to build resilience in the contact center and manage the new reality.

Jeff Berg is a partner in McKinsey's Southern California office, **Eric Buesing** is a partner in the Stamford office, **Vinay Gupta** is an expert in the Boston office, and **Raelyn Jacobson** is an associate partner in the Seattle office.