



Site Visit Notes

L.L.Bean

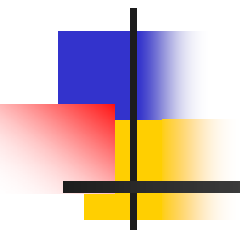
Prepared by

Avram Baskin



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- Technology History
- Call Center Roles
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Company Profile

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About the Company

- Founded in 1912 by Leon Leonwood Bean
- Retailer of apparel and outdoor equipment
- Privately owned
- Grown from a one-man operation to a global organization



About the Company (cont.)

- Headquartered in Freeport, Maine
- Five retail stores
 - Freeport, Maine
 - West Lebanon, New Hampshire
 - Marlton, New Jersey
 - Columbia, Maryland
 - Tysons Corner, Virginia
- 15 factory outlets



About the Company (cont.)

- \$1.5 billion annual sales
- 21.5% annual sales growth
- 3,900+ employees
- 2.6% annual employee growth
- 200 million+ catalogs distributed per year
- 10 specialty catalogs



About the Company (cont.)

- Products include
 - The signature LL Bean hunting shoe
 - Apparel and gear for hunting, fishing, hiking, backpacking, paddling, and cycling
 - Casual apparel for adults and children
 - Footwear
 - Housewares



About the Call Center

- Number of Representatives (Agents)
 - Peak..... 3,000
 - Off Peak..... 1,500
- Number of Inbound Calls/Day
 - Slow Periods (April & May).....50,000
 - Peak Mondays.....180,000
- No Outbound Calls Except in Response to Service Issues



About the Call Center (cont.)

- Majority of business is from the internet and telephone orders
- Mail order is small component of total sales
- Types of Calls
 - 80% of calls are for retail orders
 - 15% are customer problems



About the Call Center (cont.)

- Phone orders projected to remain flat
- Internet sales growth is 300% per year
- Internet sales projected to surpass telephone sales
- Moving toward a "blended agent" approach
 - Agents handle calls, e-mails, and chats



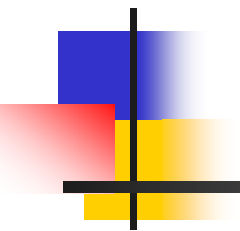
Strategic Objective

- Customer should speak with a human being as quickly as possible
 - No complex phone trees
 - If wait is four minutes or less, customer is put on hold
 - If wait greater than four minutes, customer gets a busy signal
 - Don't tie up resources for more than four minutes



Strategic Objective (cont.)

- Customer should speak with a human being as quickly as possible (cont.)
 - Four minutes is the maximum wait customers will tolerate
 - They experimented with other times
 - At two minutes they got a lot of hang ups and call backs
 - This had a negative impact on metrics



Technology History

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Technology Before Avaya

- Long ago, management wanted charts showing call center activity
 - Originally, numbers were entered manually
- Started with Egain (non Avaya product)
 - E-mail management system
 - Used system for 2-3 years
 - Didn't like vendor (poor service)
 - Stopped upgrading the system



The Case for Avaya

- In general, very impressed with the support they receive from Avaya
 - Good customer service and support is much of the reason they have stuck with Avaya, despite problems
 - Impressed with Avaya's strategic vision for the future of their products.

"Avaya is headed in the right direction, it will be huge when there is a more integrated approach"



The Case for Avaya (cont.)

- Wanted to work with a known vendor
- Wanted to replace prior vendor (Egain)
- CMS included skill based routing
 - LL Bean has very fine grained agent roles
 - Skill based routing helps get customers to the right person as quickly as possible



Avaya Products Used

- Interaction Center (IC) for e-mail and chat
- Call Management Center (CMS) for call center reporting

"It's a challenge to maintain two systems"

Sue Beckleman, IT Manager



Avaya Products Used (cont.)

- Operational Analyst (OA)
 - A product that was "inherited" as part of the acquisition of another company

"OA is not a very good product"

Sue Beckleman, IT Manager



Avaya Interaction Center

- They use the reporting tool in Avaya IC
 - This product also includes a Cognos tool for querying data bases
 - Because of their server standards (AIX) there were problems getting data into Cognos
 - They were not able to get their data loaded



Avaya Interaction Center (cont.)

- Problems with IC communicating with CMS
- Although they have issues with IC, they like it



CMS

- Using CMS for almost ten years
- Export CMS historical data for use in "home grown" historical reports
- They use CMS real time reports to analyze call volumes and assess resource requirements

"CMS is a workhorse"

Sue Beckleman, IT Manager



CMS Outside the Call Center

- Very popular with the LL Bean Marketing Department
- Dedicated VPNs (toll free numbers) for marketing



CMS Outside the Call Center (cont.)

- Track VPNs assigned to marketing campaigns
 - "Special" 800 numbers might be used in specific print ads
 - Hundreds of marketing VPNs
 - Recycled from campaign to campaign
- Some marketing personnel can access CMS, but most receive reports from Work Force Planning Analysts



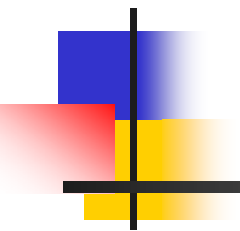
Avaya Operational Analyst

- Avaya sent someone on site to analyze their needs and to build custom reports within OA for running Real Time reports
 - Ken Stall – the Avaya employee who came on site and built the reports
- Because they couldn't use Cognos, they had to use ODBC queries created by Ken Stall



Avaya Operational Analyst (cont.)

- There was a problem with them using OA (a graphical reporting tool).
 - They were using a later version of Java than was Avaya supported in OA
 - So they could not view graphical reports
 - They have been working with Aaron Epstein, OA product manager
 - He has been helping them to resolve issues.



Call Center Roles

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Vice President

- Director of all call centers
- In charge of all of customer services
- Also has direct reports outside of the call center (in the Returns department)
- Responsible for strategic direction of the call center



Vice President (cont.)

- VP believes it is important for the customer to speak with a human being as quickly as possible



Operations Director

- Responsible for all operations down to the agent level
- Hiring, staffing, quality assurance, monitoring calls, recommendations to mentors, budgeting
- In short, anything that has to do with the people part of the call center



Technology Director

- Primarily responsible for implementation of GUI interface for all internal systems
 - Up until two years ago sales system was a mainframe system
 - System had a "clunky" interface
 - Learning the system required a lot of training



Technology Director (cont.)

- Management decided it would be advantageous to have an intuitive GUI interface
 - This would cut down on training
 - Make the system easier to learn
 - Purchase or build a system
 - Historically, they did development in house.



Technology Director (cont.)

- Build GUI on top of old system (Front End System -- FES)
 - Technology Director role created to support and implement FES
 - FES accelerated the training of new agents
- Migrate all functionality to FES
 - Systems will include training, administration, and support
 - Order taking system has been completed



Work Force Planning Analyst

- Responsible for staffing and scheduling in real time
- Analyze all call, e-mail, chat, and mail order activity
- Make sure work is evenly allocated to agents.
- If high call volumes in certain areas, reassign agents to those areas



Work Force Planning Analyst (cont.)

- Monitor and manager call flows
- Determine number of agents needed at any given time, based on call volumes
- Planning for staffing changes in 15 minute increments
- Route calls to different locations, based on call volumes in each location



Work Force Planning Analyst (cont.)

- Designing, running, and distributing real time and some custom reports
 - Used to analyze, understand, and balance business needs on a global level
 - Anticipated responsibility will increase when CCR is implemented
 - Reports that can be easily created in CMS
- Use historical data extracted from CMS, but don't use CMS historical reports



Work Force Planning Analyst (cont.)

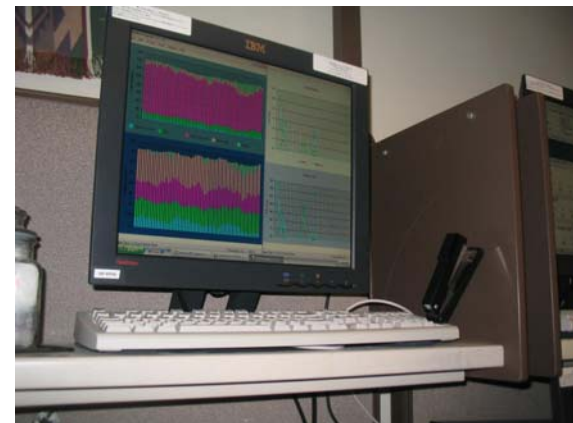
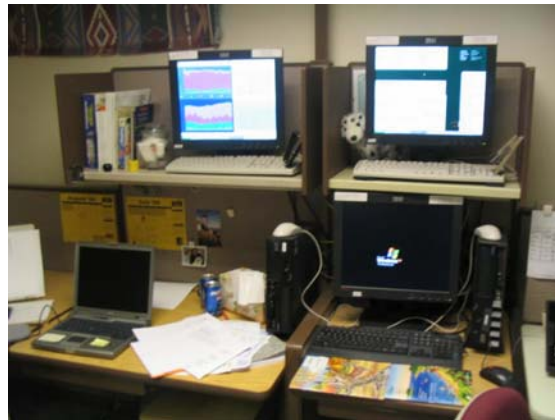
- Responsible for CMS administration
- Examples
 - Setting up new users
 - Granting access rights to various components of the software



Work Force Planning Analyst (cont.)

- Can work in either Portland or Lewiston call center
- Done for risk management and to accommodate the needs of the analyst

Work Force Planning Analyst (cont.) -- Workspace



Work Force Planning Analyst (cont.) -- Workspace



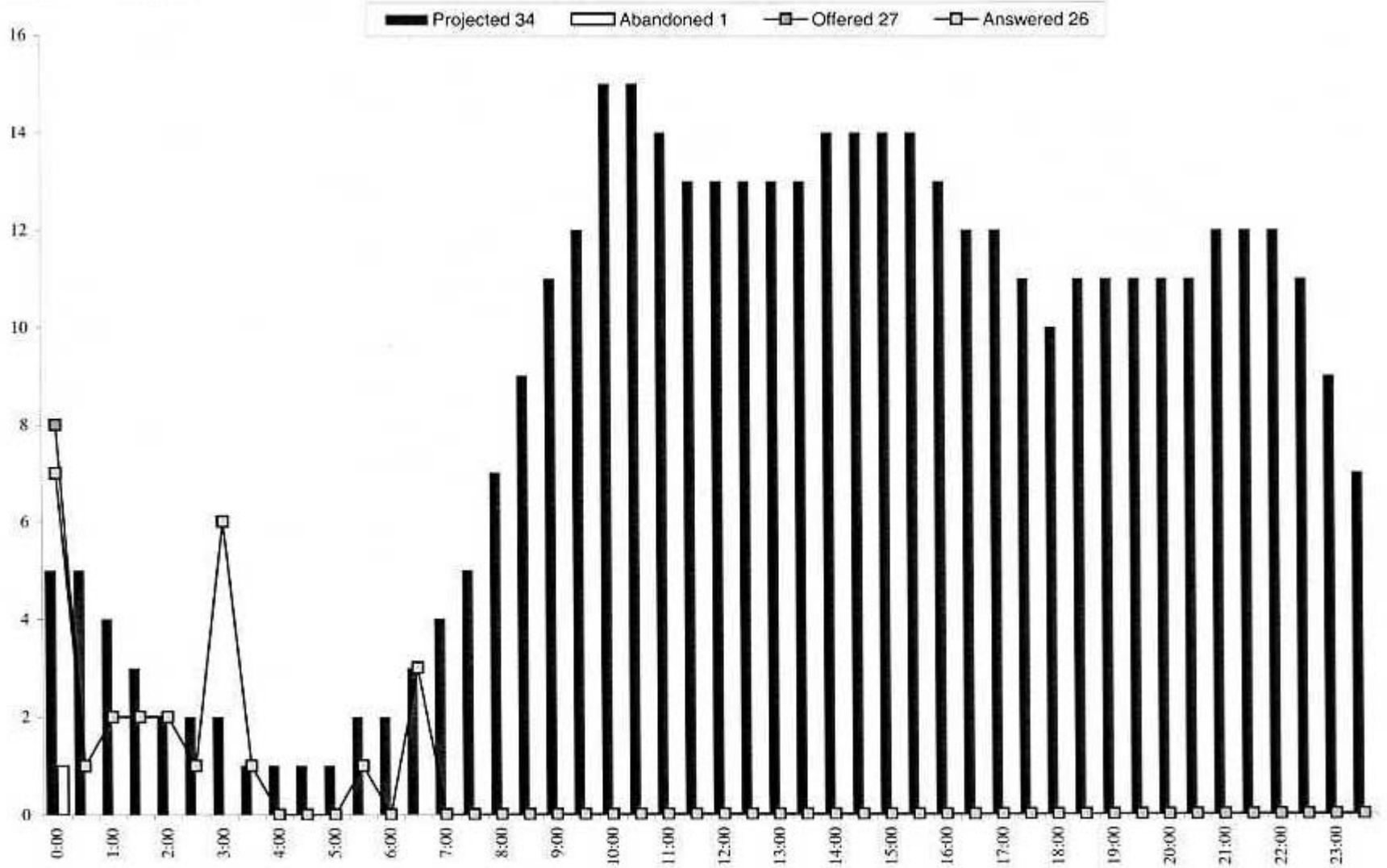


Work Force Planning Analyst (cont.) -- Reports

- Real Time Reports
 - Chat
 - E-mail
 - Marketing Calls
 - Inquiry Calls
 - Order Calls
 - Order, Inquiry, & Marketing Calls

Thursday 7/20/06

Chat



27 Chats today, which is 20.6% under projections. Chat AHT today is: 06:41 (mm:ss).

Last Updated

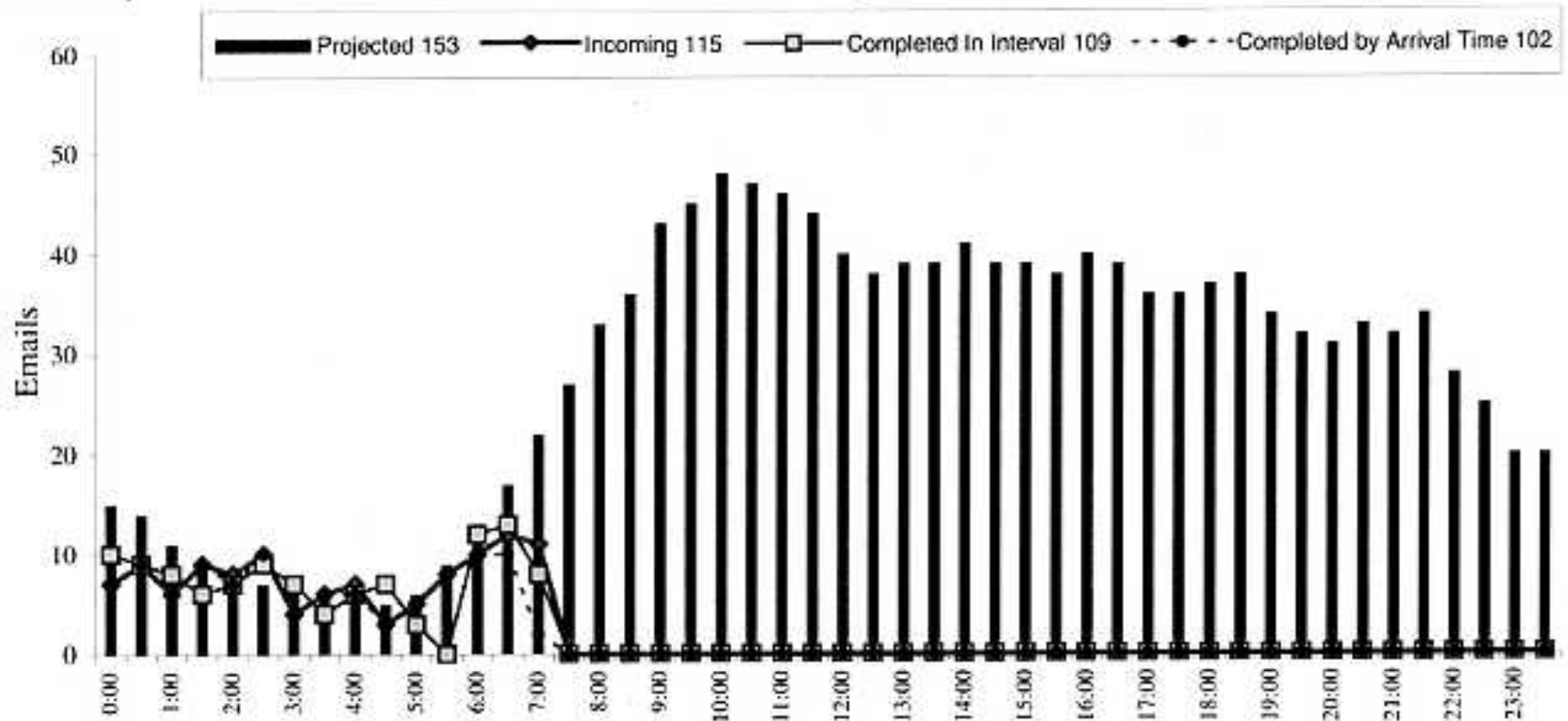
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Thursday

7/20/06

Email Today



115 Email received today, which is 24.8% under projections. Turnaround time today is: 00:22 (hh:mm).

The dotted line shows emails completed before midnight that came in during that specific interval. Completed in Interval shows actual completed emails during the interval no matter when.

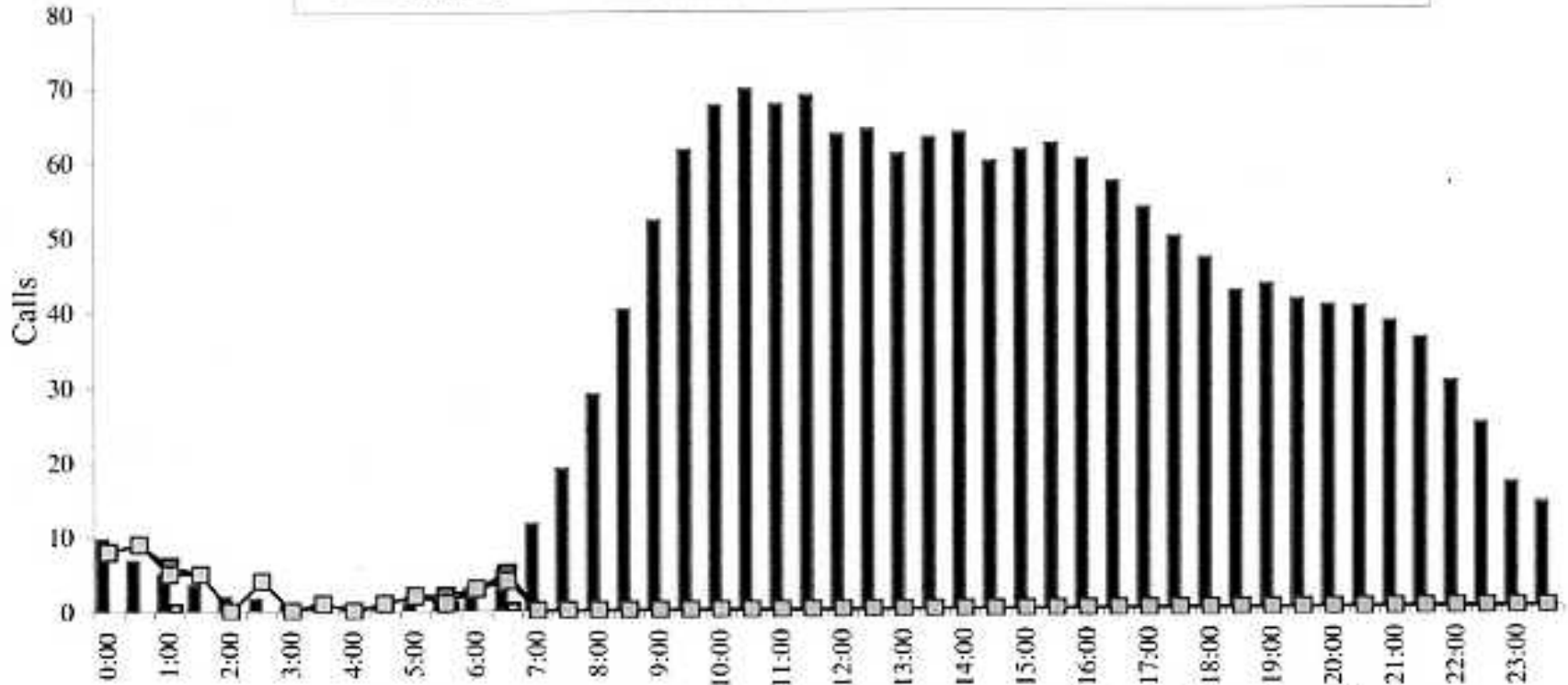
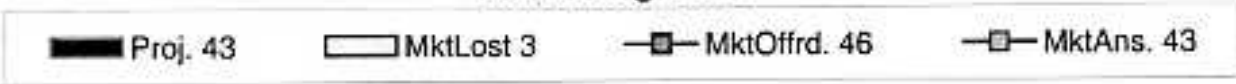
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Thursday

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Marketing Calls



Marketing calls answered so far = 43, or 10.3 % over budget and 0 % under projection

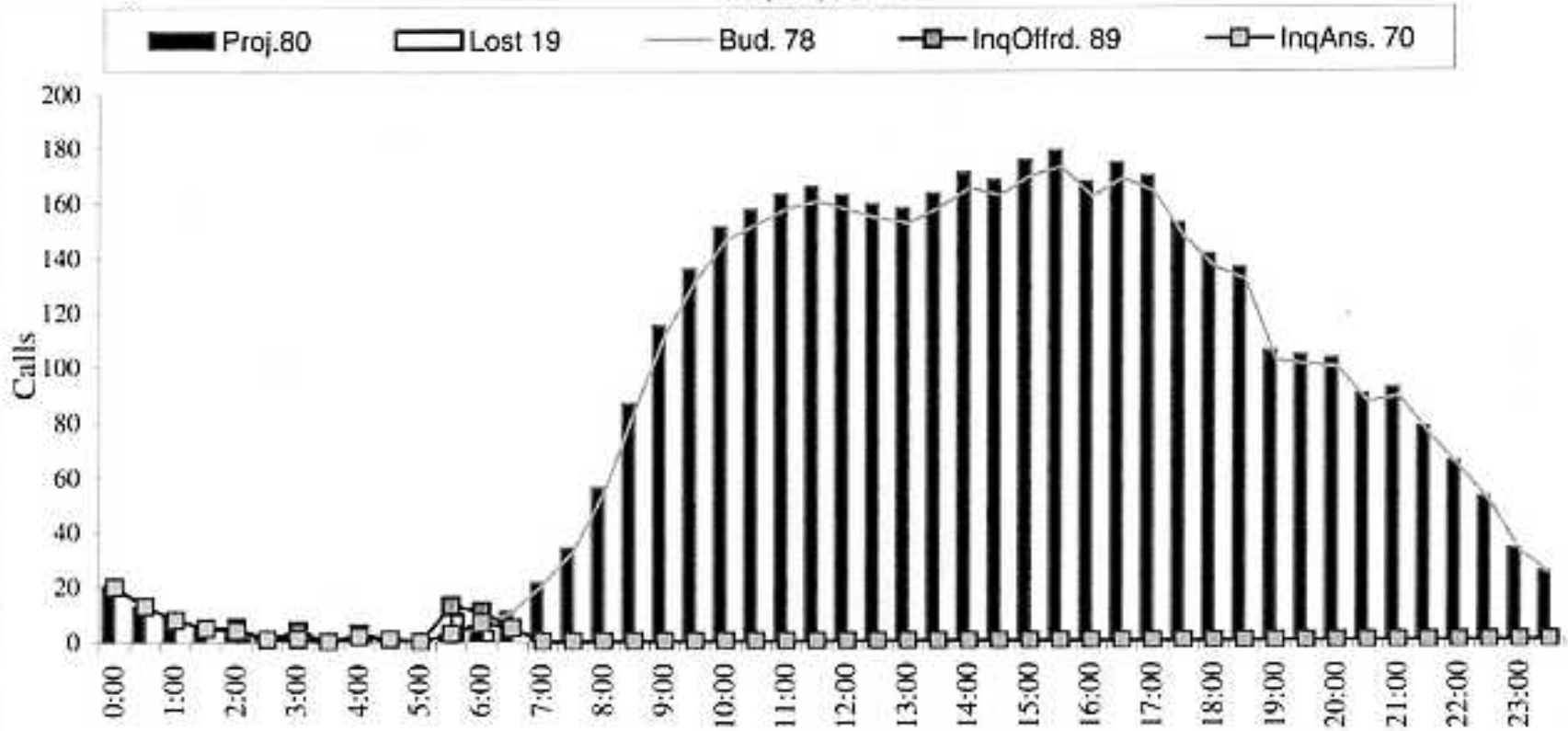
TSF: 96%

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Inquiry Calls



Inquiry TSF: 82%

Inquiry calls answered so far = 70, or 10.3 % under budget and 12.5 % under projection

Inquiry Occupancy: 78.5%

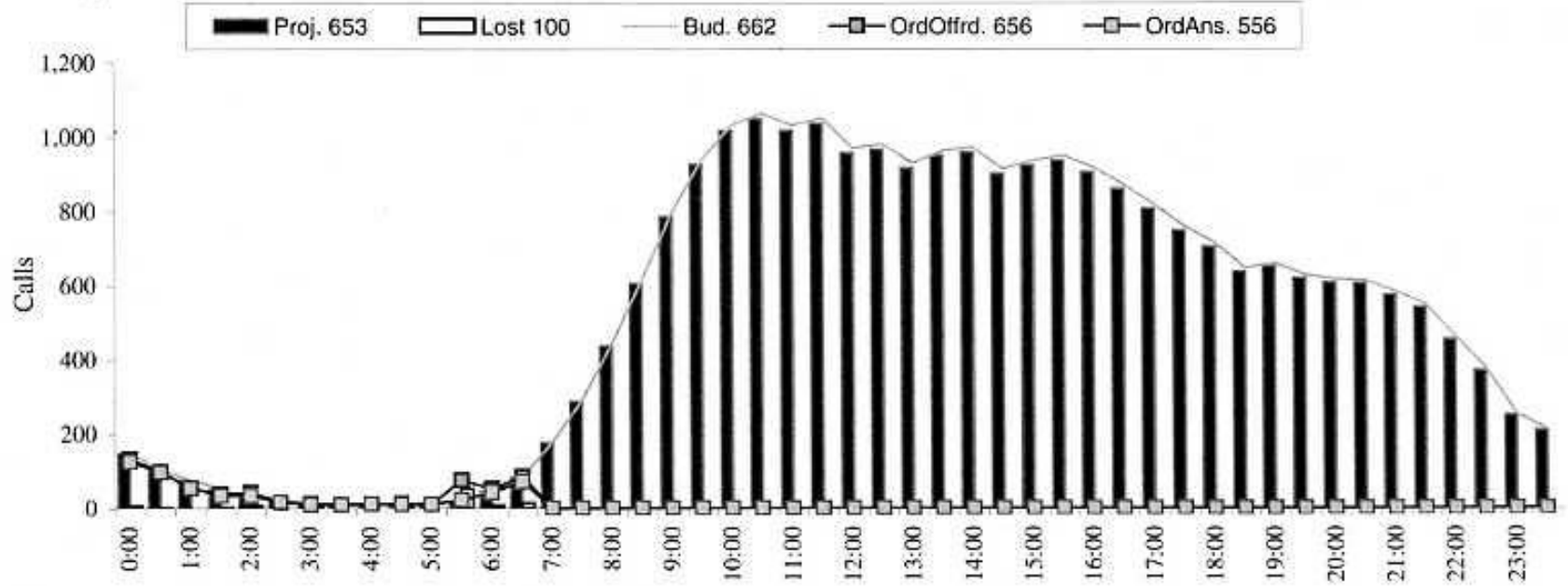
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Order Calls



Order TSF: 83%

Order calls answered so far = 556, or 16 % under budget and 14.9 % under projection

Order Occupancy: 76.0%

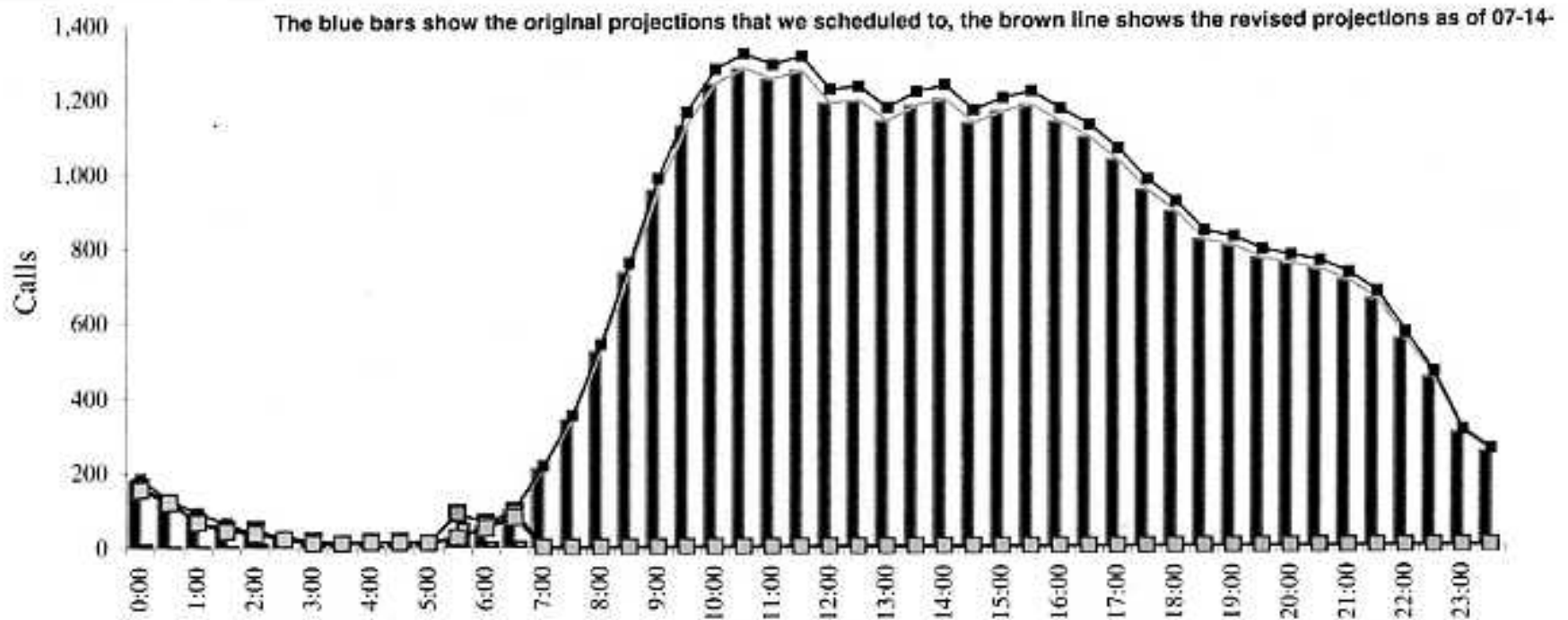
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Order, Inquiry, & Marketing Calls in All Call Centers



Last Updated
7:31 AM

Total Calls Offered so far = 791 or 1.5% over budget and 1.8% over projections.
Total Calls Answered so far = 669 or 14.1% under budget and 13.9% under projections

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Senior Scheduler

- All advanced planning for the call centers
- Scheduling up to a week in advance
- Planning for number of agents needed in 15 minute increments
- Use historical data extracted from CMS, but don't use CMS historical reports



Project Leader

- Like a project manager
- Responsible for short-term projects no one else wants
- Examples:
 - Implementing replacement of PC monitors at agent work stations
 - Setting up the call center ergonomics program



Manager

- Direct reports are senior supervisors
- In charge of all customer services within the areas that report to them
- Responsible for implementing strategic direction set by the vice president



Senior Supervisor

- Direct reports are front line supervisors
- Responsible for maximizing efficiency and productivity
- Uses seven historical reports
- Most interested in average handling time as measure of agent productivity



Front Line Supervisor

- Supervise groups of agents
 - Approximately 25 – 30 agents assigned to each frontline supervisor
 - In periods of off peak business a supervisor may be responsible for as few as a dozen agents
 - During peak periods, such as the winter holiday shopping season, a supervisor may be responsible for as many as 50 agents



Front Line Supervisor (cont.)

- Respond to calls forwarded by customer service representatives (CSR 1, 2, 3)
 - Any CSR can forward a call to a supervisor



Representatives (Agents)

- Responsible for all telephone and e-mail contacts with customers and LL Bean employees

Customer Service Rep.

[CSR] 1

- First contact for customers calling on the order line
- "Easy" calls – CSR 1 can resolve the call with information available in the catalog
 - All agents have a catalog at their desk
- Very experienced with the products
- Can quickly fill orders and make recommendations

Customer Service Rep.

[CSR] 1 (cont.)

- DO NOT have access to most systems
- Work primarily with the catalog and the retail web site
- If a call requires access to another system, CSR 1 will pass call to a CSR 2
 - Looks for certain catch phrases ("I'm so angry...", "I have a problem...")
 - Pass off is not automatic, CSR-1 can try and resolve these problems.



Customer Service Rep. [CSR] 1 (cont.)

- Example of a "pass off" call
 - An inquiry about a customer's account – *"did you credit my credit card account"*
 - CSR 1s do not have access to the financial system

Customer Service Rep.

[CSR] 2

- More training and access to additional systems
- Will get “problem” calls from a CSR-1

Customer Service Rep.

[CSR] 3

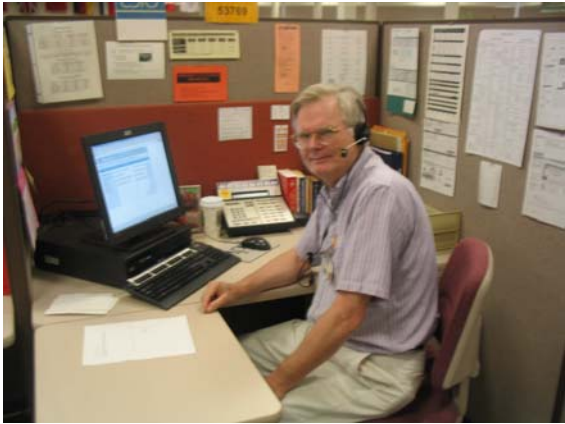
- Most expert agents in the call center
- Access to systems that the CSR-2s do not have access to
- Handle extremely irate customers –
“you ruined by Christmas, that sweater was so important to me, what are you going to do about it”

Customer Service Rep.

[CSR] 3 (cont.)

- Know how to navigate the entire LL Bean infrastructure (electronic and physical) to get the answers they need to resolve customer problems
- CSR-3s use current state real time reports

Customer Service Rep. [CSR] 3 (cont.) -- Workspace





Product Support Specialist [PPS]

- Experts in specific activities, such as fly fishing, camping, and hunting
- If a customer is planning a fishing trip, a PSS can provide very specific advice, down to the level of best flies for specific lakes and streams
- Portland is the only call center staffed with product support specialists



Blended Agents

- Moving toward a “blended agent” approach.
 - Agents who handle calls, e-mails, and online chats
 - All e-services agents are blended agents
 - 200 agents out of 1,300 total agents on staff in all of the call centers are blended



Blended Agents (cont.)

- When a call comes in that only a blended agent can handle, it is transferred to the Skill 47 queue
 - Issues include problems encountered processing transactions on the retail web site
 - A CSR 1s and most agents on the floor cannot handle these calls



Product Support Specialist [PPS] (cont.)

- Specialty catalogs for certain sports (camping, fishing, and hunting)
 - Dedicated 800 numbers so the customer can “talk to an expert”
 - Numbers go directly to a product support specialist.
- PSSs support other sports, but other sports do not have dedicated catalogs



IT Administrator

- Responsible for maintaining the IT infrastructure related to CMS
- System backups and data storage
- Implements CMS upgrades

"I'm responsible for the care and feeding of CMS"

Sue Beckleman, IT Manager



Operations Analyst

- Specialized role, filled by a single individual
- Responsibility for all historical reports
 - Some reports are one time only
 - Example: a one time only report might be run to respond to a query from human resources if they are hiring and want to know what the busiest hour is every day
 - Most reports are saved and run on a daily basis



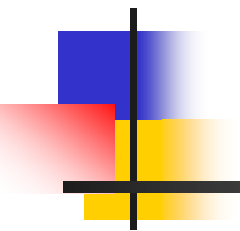
Operations Analyst (cont.)

- Most historical reports are “custom”.
 - Use data exported from CMS
 - All of the reports are created in home grown LL Bean systems
 - Not created in the CMS custom report builder
- One of the reasons they don't use the CMS historical reports is that the CMS reports do not include time on hold



Operations Analyst (cont.)

- Most historical reports are “custom”.
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Group Interview

Jamie Ruhlin: Senior Supervisor

Les McDowel: CSR 3, e-Services

Manfred Brackton: CSR 3, e-Services

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Jamie Ruhlin – Senior Supervisor

- Jamie is responsible for all of the e-services (web sales) agents
- Direct reports are front line supervisors
 - Two in the Waterville call center
 - Two in the Bangor call center
 - Four in the Northport call center



Jamie Ruhlin – Senior Supervisor (cont.)

- Jamie described his responsibilities as being to “maximized efficiency and productivity”
 - Primary measure of productivity is average handling time
 - Threshold is to be within 5% variance of pier agents



Les and Manfred – CMS 3s

- Les and Manfred have access to CMS reports
 - There are “two or three” real time reports that are key to them
 - If more were available they might use them



Les and Manfred – CMS 3s (cont.)

- Les and Manfred describe themselves as "troubleshooters"
 - Help core e-services reps solve customer problems
 - 70% of their time
 - Resolve issues that are elevated to them
 - 30% is spent speaking directly with customers



Les and Manfred – CMS 3s (cont.)

- Les and Manfred also deal with global issues that affect all agents
- Example
 - Detected a CMS bug that caused the system to not always track when agents were available for calls, even though the agent had checked back into the system
 - Affected agents reported as unavailable on the real time Auxiliary Time report.



Contextual Observation

Anne Vincent

Work Force Planning Analyst

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Tasks

- Day begins at 7:00 a.m.
- Opens screens for real time reports she uses to analyze call flows and agent activity
- She takes phone calls on a variety of issues
 - During her start of day procedure she took a call about staffing for the Waterville call center



Tasks (cont.)

- Every 30 minutes she runs a report that aggregates the data for that time period
 - Data is posted to the intranet (the Daily Spreadsheet)
 - Compares actual call volumes to projections and budgets



Tasks (cont.)

- Posts a series of charts on the intranet every 30 minutes
 - Seven days worth of charts are maintained on the intranet.
- There is a macro for posting reports and charts – one button does it all



Tasks (cont.)

- Whoever runs traffic is responsible for maintaining a log report of all activity
 - Log includes anything that can impact the performance of the call center
 - Call volumes
 - System problems
 - Weather



Tasks (cont.)

- During start of day procedure, call each call center to see if there were developments over night or other issues of importance
- She reviews call data for last few days because she hasn't been in the office



Tasks (cont.)

- At 8:00 a.m. she checks e-mail, which may include
 - Requests for reports
 - Service related discussions
 - Requests from agents for extra shifts
 - Warehouse status reports
 - Shipping delays may result in higher call volumes



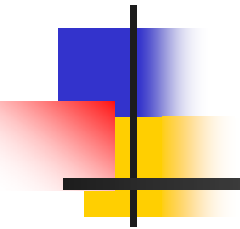
Tasks (cont.)

- 8:30, checks intranet for agents willing to be sent home if low call volumes
- Updates the daily log
- Call from Mail Order Services
 - Orders are above projections
 - MOS agents on reserve for phones, MOS supervisor wants to take them off reserve
 - Instead, Anne assigns help to them from the phones while call volumes are low



Tasks (cont.)

- Update hotline
 - Dedicated phone line agents can call to see if extra work is available
 - Updated throughout the day, as additional
 - At 7:45, she updated the hotline to indicate all extra shifts have been filled



Environment

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Staffing

- Ideally, two Work Force Planning Analysts per shift
 - One running reports
 - One running traffic
 - In off peak times, only one analyst



Work Area Setup

- Four monitors for reports
 - Two above
 - Two below
- Reports (examples)
 - Staffed Agents Report
 - Group VPN Report
 - Split Skill Report
 - Reps with Top Skills Report
 - Resource Queue Report



Call Center Organization

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Locations

- Five locations, but they are operated as one virtual call center
 - Four are permanent (Portland, Bangor, Lewiston, Waterville)
 - One is seasonal (Oxford)



Group Naming Conventions

- Team Naming Conventions
 - Codes are used to name teams of agents
 - When a supervisor moves on, team name stays the same
 - Change the name of the person filling the role
 - Team NP2A
 - NP = Northport (Portland) Call Center
 - 2 = Second Shift
 - A = Team A



Group Naming Conventions (cont.)

- Team Naming Conventions (cont.)

Center Codes	Center Names	Shift #s	Teams
NP	Northport (Portland)	1 = First Shift 2 = Second Shift 3 = Third Shift	All teams are designated with letter codes: Team A, Team B, team C, etc. All team names are unique
PK	Peak (Lewiston)	4 = First Shift 5 = Second Shift	
WCC	Waterville	8 = First Shift 9 = Second Shift	
OX	Oxford	Seasonal Call Center	
BCC	Bangor	12 = First Shift 13 = Second Shift	



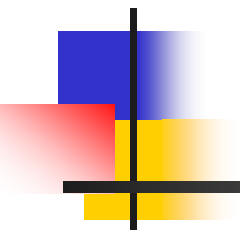
Call Routing

- The primary trunk line (the main 800 number) is the order line – 800-221-4221
 - Phone number printed in the main catalog
 - Customers use it to place orders
 - Business assumption is that most calls will be calls to place orders



Call Routing (cont.)

- When a call is received it is automatically routed to a CSR 1
- No formal telephone tree (i.e. if you want to purchase a product, press one, for customer service, press 2, etc.)
- CSR 1 forwards calls to more experience agents, as needed



Suggestions

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Suggestions

- Be able to run a real time report in the background and receive a report if an agent gets “out of synch” (out of standard)
- LL Bean has created a large number of custom reports. It is very important to them to be able to import custom reports into CCR from CMS



Suggestions (cont.)

- They would like to be able to set up a report that compares data for different time periods – a column for yesterday, next to a column for the same date a month ago, next to a column for the same date one year ago



Suggestions (cont.)

- Import credit card information (for example, information about their LL Bean Visa), into CCR, for inclusion in CCR reports
- They would like CCR to record number of transferred e-mails
- Reports should be available with median time as well as average time



Suggestions (cont.)

- Provide greater access to needed data
 - The Traffic Report is generated from CMS data through ODBK
 - Non Avaya product provided by Avaya
 - Provides access to data stored on server
 - Provides access to data from IC E-mail
 - The traffic report created in Excel using macros
 - ODBK extracts data from Avaya systems
 - Avaya provided ODBK driver because Avaya was unable to provide needed data



Suggestions (cont.)

- IC should be able to pull call data from CMS so IC reports can include calls and e-mails
- Provide a measure of how long an agent is logged out (i.e. on break) as well as how long they are logged in
- Process for requesting a new report
- Route calls based on skill, not queue