



## Case name: Technical Support and Communication Styles

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**Company:** A software products company

**The challenge:** Improving effectiveness of customer relations of 60 technical support representatives charged with answering customer calls and supporting the products, some via the internet.

**Purpose:** Reduce number of calls going to supervisors, reduce call time and improve the customer service interface.

### **Existing conditions:**

The management was concerned about the effectiveness of the representative's handling of incoming customer calls. They were particularly concerned with two issues: 1) Too many calls were "escalating upwards to management"; 2) Some of the calls were too lengthy, thus they wanted to reduce the call times.

### **Desired outcomes:**

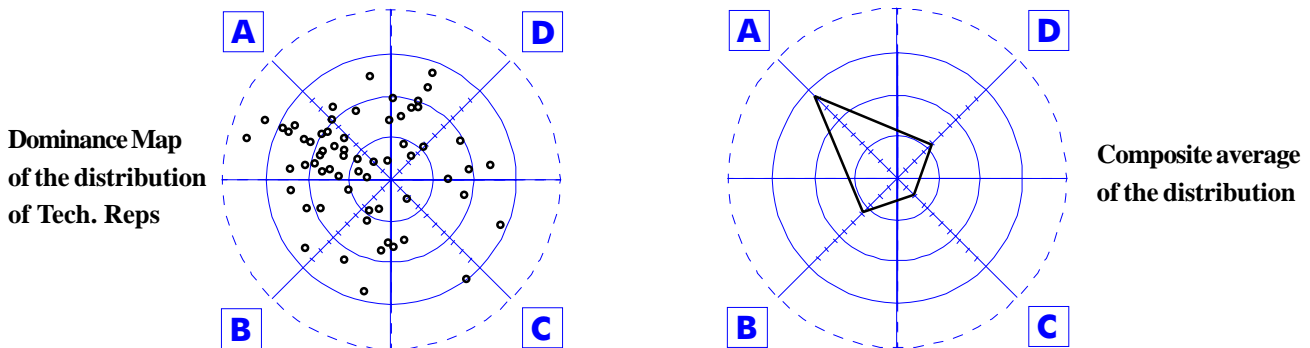
Short term: Management wanted the technical support staff to learn how to handle different types of customers (such as those who were upset, were novices, were needing their hand held, etc.) They wanted the technical representatives to be more flexible and to be able to change their approach according to the skill level or attitude of the customer. Appropriate tools to be able to disarm customers and maintain control of the call were also desired. Another objective was to help the reps to learn how to get to the actual problem and to be able to offer steps to resolve that problem. Finally, the company wanted the reps to be able to understand and manage the customer's expectations as well as know how to 'close' a call.

Long term: Over time, the application of the tools provided and skills developed would result in significantly improve call handling, which would in turn improve customer relations. The potential of improved customer relations was improved business results.

### **Whole Brain intervention methods, processes and strategies:**

It appeared probable that the technical representatives learning styles were dramatically different from the mentality of the desired outcomes slated by management. The first step was persuading management to assess the thinking styles of the group. The resulting profiles confirmed the suspicion that the technical support group was primarily an A quadrant dominant group who as learners

needed to develop a more right mode (C+D quadrants) customer approach. The dominance map illustrates this left mode tilt and shows additionally that only 5 out of the 60 technical support reps exhibited a preference for the interpersonal C quadrant.



A one-day workshop was designed which addressed the short-term desired outcomes in the context of the Whole Brain Model. In addition to each participant receiving their HBDI profile package, each work team received a composite team profile package. The workshop provided a key tool in the form of a "Whole Brain Flow Chart" on how to handle a call (i.e.. First be friendly, then empathic, simultaneous, organized, and a problem solver. Also to be logical, objective, flexible, creative, articulate). A set of brain dominance "clues" were developed so that participants could better identify their customer (see model next page).

In addition, the workshop content provided the technical support reps with a better understanding of why some customers felt more comfortable using the internet for online support, and why some callers only wanted a "real person" to help them.

### Summary of outcomes:

The average call time for February and March (immediately after training) dropped 27% and 39% respectively. Call time then went up in April due to the release of a new product which involved new technology for the reps.

### Optimizing the results:

An internal follow-up training occurred in mid April, re-iterating the whole brain approach and style flexibility. Many of the reps posted the quadrant descriptions and colors near their phones as constant reminders of communication style differences. The fact that the organization took this follow-up initiative demonstrated that they had new found understanding for the importance of style and preferences in the customer interface. Due to the technical culture of the organization all problem diagnosis was originally focused exclusively on technical issues. More data will be collected in the future to monitor the results of this ongoing effort.

**Brain Dominance Customer Call Clues**

<p><b>A</b></p> <p>Talk technical I know the problem Facts “That is not a logical solution” Cost concerns Specs “I decompiled your program and” “Build my own” “I’m a system administrator” “I’ve already analyzed the problem” Gives clear description of problem</p>	<p><b>D</b></p> <p>Talk about improvements Does other things during call Unrealistic expectation “Thingy” Simultaneous program concerns Play games in background Talk visually/Wants visuals Easily distracted “Left field” No error messages Not prepared for call</p>
<p>Concerned with warranty Follow every step Details Time concerns List of possible solutions Step by step Tell you when to talk back Wants documentation Written format “Why haven’t you fixed it yet?” <b>B</b> May have already checked the web site Reluctant to change</p>	<p>Emotional “The boss will kill me” Gives praise No clue as to purpose of product Asks personal questions Wants a “service relationship” “It just doesn’t work” Don’t know technical terms “Where is the ANY key?” <b>C</b></p>

**Success measurement criteria applied.**





The success measurement process allows up to 100 points to be allocated to each of the four quadrants of this Whole Brain process. The success measurement points for this case are allocated as follows:

A quadrant: Reduced call time for Feb. & March

B quadrant: Call closes happening faster

C quadrant: Improved understanding of customer styles and handling

D quadrant: Greater flexibility in responding to call

<u>Metaphors</u>		<u>Success measurement points</u>	
<p><b>A</b></p> 	<p><b>D</b></p> 	<p><b>A</b></p> <p style="text-align: center;"><b>75</b></p>	<p><b>D</b></p> <p style="text-align: center;"><b>50</b></p>
<p><b>B</b></p> 	<p><b>C</b></p> 	<p><b>B</b></p> <p style="text-align: center;"><b>75</b></p>	<p><b>C</b></p> <p style="text-align: center;"><b>100</b></p>

