



SURVIVING PEAK

5 Things you need to know...

...from 4 people who know them

We asked four Capita experts how they help clients make Peak a success.

From preparing for the inevitable surprises, to how customer behaviours shift, to making sure your IT won't fall over, this is what they said.

Dramatis Personae

Tracey Howson, Head of Insight and Analytics

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1 MISSION CRITICAL

What's the most important thing to remember and prepare for when running up to any peak period (but especially Black Friday and Christmas)?



It's not just about the numbers and sheer volumes involved at peak, its about focusing on the quality of service and maximising customer experience. Clients have numerous departments, divisions and areas that are all going to be under pressure during peak and we need to recognise this. In the contact centre we are uniquely placed to be an early indicator of issues across the entire retail process. Clear and timely comms can prevent or relieve problems before they become significant. **EC**



For this major retailer, **it's all about quality**. Due to the size of operation that needs to be brought in for the Peak period, we would jointly work with the client to develop plans for onboarding, embedding and maintaining a quality service. **TH**



Plan, plan and plan just a little more! Whether it's staffing, IT or the client adding in new activity, **Peak will always throw you a curve ball**. Be prepared for every eventuality, look after your people - they will be your ambassadors throughout this busy time – and work hard to keep them motivated while they are busy. Even during Peak it should still be fun to come to work! **JW**

2 GUIDANCE

What's the best advice you can give to clients about it?
Are there things they often ignore or don't take into account?



Be realistic about the challenge of Peak and set expectations across the entire business as to what they can expect from their contact centre during it. Don't underestimate the importance of educating and myth busting. Operational stability early in the year provides the foundation from which to launch a successful Peak. Rather than seeing it as one giant challenge, **break everything down** into bite-sized, actionable pieces. **EC**



We are lucky as we work in absolute partnership with our client – but the best advice would be to **trust us**. Within Capita there is such a huge wealth of experience and information that we can always find the answer, or at least someone who knows it. And open lines of communication are critical – we need to be honest with our clients, and they in turn need to keep talking to us. That way we can deliver successfully together. **JW**



It's sometimes hard for clients to appreciate the time required for **speed to competency**, the volume of recruitment and the impact on the experienced team members to support. The secret is to plan early, plan collaboratively, and have an open and honest dialogue. **TH**



Our retail customers are very mature and know what it means to be not available when people are buying. If our Customer Engagement Centres are not available, our customer's customer *may* come back later – but nobody is going to count on it. But food retailing (which we do not service) **is far more unforgiving** than general merchandising. For Christmas, the big shop is a one-off event, and if you are not in the mix for it, you've lost for that year. Period. **EH**

3 PLANNING

What are the major steps in planning for a peak period?
How early would you start? What's at the top of your shopping list?



Well, in IT we've been preparing for a while... For us there are seven key steps to focus on during the retail peak period:

1. A freeze on extreme changes – a complete lock down on change in the run up to Black Friday and Cyber Monday. We only deploy non-affecting minor changes in the run up and none at all from 00:00hrs on November 22nd November to 24:00hrs November 28 (Cyber Monday)
2. Advanced checks of key environments – carried out on all systems, networks and components that we control
3. Daily checks on the key trading days – each morning before trading starts, checks are made on all Citrix and other technology environments to ensure services are available
4. Senior partnership managers and field engineers on site – to coordinate actions at each location. Field engineers will be present to address anything they can, and also to help ensure the right diagnosis of any issue is passed back to the operations centre for instant resolution and incident management
5. Expanded incident management team – covering the key trading period in the event of any incidents emerging
6. Central standby team – to address any emerging issue. No other changes are being made at that time so people will be on site in major locations to address anything that emerges
7. Hourly "Ops Normal" advice during operating hours – to advise all is well, or if there are any minor delays **EH**



Establishing priorities, objectives and communication is the first step in Peak. The figures and required data will soon follow. When to start depends on the client and industry, but for one particular client, we begin with a Post Peak Review in February and kick off formal planning sessions shortly after. This is due to a summer peak period in July that we also use in preparation for Black Friday, Christmas and January Clearance. **TH**



One major retailer begins pretty much after the last one has ended and our full blown planning begins in early summer when everyone else is sitting in the sun...! Top of our shopping list is always the same thing, **having the best people in place** to service our clients' customers. We have a rigorous recruitment approach to ensure we provide them with the right people to talk to their customers and resolve issues. Empathy is critical, as well as professionalism and ownership. **JW**



It's never too early... I've already had one conversation about Peak 2018! It's an annual cycle starting in February, discussing and documenting lessons learned in order to build them into future plans. March through to May is the best window of opportunity to make any significant changes to the operation, those you believe will drive operational excellence and set you up for success in Peak that year. During the summer clearance period these changes will be tested and then the serious discussions for winter Peak kick off in July-August.

Early and accurate forecasting allows models to be built that can be **reviewed and stress tested.** Recruiting timescales are vital to adhere to in order to optimise your attraction strategy leading to a higher quality candidate.

3 PLANNING

Be decisive and get the easy tasks completed as early as possible leaving you time to concentrate on the difficult stuff when it counts - with as few distractions as possible.

Shopping list? Anything that can provide me with an accurate track of FTE throughout the end-to-end advisor journey, from resourcing, to training, to grad bay, to operational detail by individual team and service line. **EC**



4 SURPRISES

What are clients often not prepared for and how can Capita help?



No matter how much preparation you do, there will always be something that surprises you. Solid planning and discussions around contingency measures are what allow operations to deal with the unexpected decisively and effectively.

An open, collaborative relationship is key.

Walking through various scenarios for critical dates such as Black Friday is a real help as it allows constructive discussion. It's a lot better than dealing with situations for the first time when the pressure is on.

Capita provides insight from market trends through to detailed year-on-year analysis specific to the client, and that's vital during the planning and validating stages prior to Peak. And it's important to jointly agree **what success looks like** for Peak so it can be measured and (fingers crossed!) celebrated. **EC**



Clients often underestimate the **impact to BAU** and the restriction on additional activity due to Peak. This includes management and support functions. Fortunately we have vast experience in such situations. We have all the data, insight and programme management expertise that enables us to set expectations clearly and early, and that really helps support clients through Peak. **TH**



Clients are often not prepared for **how quickly customers react** to new offers, and can underestimate how much their customers do want to shop with them! We can help with forecasting volumes of calls and talking to them about how fast certain lines are selling – everyone likes a bargain! We are the eyes and ears of their business at this busy time and the customers tell us first if something isn't working on the website or deliveries are failing. Our role is to provide our clients with that feedback quickly so they can react. **JW**

5 CUSTOMERS

How do customer behaviours change during the peak period? What do advisors notice?

Customer sentiment **changes overtly** during peak periods and particularly Black Friday and the run up to Christmas. It's a more emotionally charged time of the year - whether it's frustrations over securing a fantastic Black Friday deal or the stress of finding the perfect present for a loved one, particularly in the final days leading up to Christmas. Will Santa be able to deliver this year?!

The **ability of advisors to empathise** with the customer is more important than ever at this time. Often simple reminders such as 'imagine the customer is your mum/dad/brother/sister etc' helps advisors warm to customers who may be feeling just a little stressed – and demonstrating it!

The training we focus on going into Peak is around attitude and behaviour. Yes, there are always processes to follow and these are important, however **empowering advisors to 'do the right thing'**, even if it means stepping outside these processes, ultimately leads to happier customers – and at no time is that more important than a Christmas Peak.

A rewarding and fun-packed engagement plan during Peak is vital to relieve the stress for advisors. Make management more visible to them and show them that they are supported and their dedication recognised through a variety of rewards and awards. **EC**



Clients undoubtedly feel the pressure too, driven by the importance of the period in terms of sales volume. They can make or break their year through the right campaigns, trading strategy and good execution at the time. Absolutely every item going into a basket and through the tills counts.

It's 10,000 times worse than the most fraught episode of The Apprentice... **EH**



Working for this major retailer at Christmas is truly special. They have been a British institution for such a long time that everyone eagerly looks forward to delivering a great Christmas for them.

Their customers are like no other.

Because their parents and grandparents have always shopped there, the expectations to deliver a great service and make every moment special is critical. Our customers' view is that we form an integral part of their Christmas celebration and it's our job to ensure the customers' countdown to Christmas runs as smoothly as possible. **JW**



Customer behaviors definitely change over the Christmas peak period. They are **more demanding, less patient** and very articulate on both accounts. We have seen this reflected in the verbatim left in both complaints and Customer Satisfaction surveys. I think they feel a huge pressure to deliver a great Christmas for their families, and this is then reflected on those companies that they do business with. **TH**

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