‘Cheating the system’, Getting the Work Done: Challenging Management and Technology in a Call Centre

Bob Russell
School of Management, Griffith University

Keith Townsend
School of Industrial Relations, Griffith University

Abstract
This paper studies the process of technological change in a large call centre. It examines the rationales for introducing a new software system and the effects of these changes on the types of skill that workers are called upon to exercise in their jobs. We argue that technological change is an iterative rather than a linear process, while unintended consequences may be as significant as managerial plans and prerogative. This has implications for problematising technological change rather than assuming it as a given.

Introduction
There are intriguing paradoxes when it comes to considering how new technologies are designed and how both managers and workers appropriate them in environments such as call centres. In this paper we study one instance of technological change in a call centre, and examine the implications of this for understanding the labour process in an information oriented work environment. Throughout the paper our chief concern is to get behind the ‘taken-for-grantedness’ of new information technologies, recognising that they are both socially designed and appropriated within specific social contexts. The manner of their appropriation and use may deviate significantly from the ideal typifications that we have of managerial prerogative and technological change.
Technology as Driver?

The enabling features of new information technologies and their effects on how business is transacted, (Bell 2001; Dicken 1998), how production is organised, (Delbridge 1992; Sewell and Wilkinson 1992; Sewell 1998), how service is provided (Sturdy, Grugulis et al 2001; Korczynski 2002) and how labour is deployed have been widely glimpsed in a series of publications. In this paper, we are primarily interested in the effects that technological change is having on customer service provision and on the people who carry it out in voice-to-voice, call centre interactions. It would be fair to say that the dominant picture we have of call centres emphasises the role that new information technologies play in structuring work processes. Authors who employ differing interpretive templates, including those derived from a reading of Foucault, (Fernie and Metcalf 1998; Knights and Odhi 2002), as well as those that emerge from a Marxian labour process perspective, (Bain and Taylor 2000; 2002; Bain et al 2002; Callaghan and Thompson 2001; Taylor and Bain 1999 2001), concur on the importance of technological design and application in call centre work. This applies to the delivery and pacing of work as well as its monitoring.

Both Foucauldian organisational theory and Marxian labour process approaches treat technology in a non-problematical fashion, which is capable of delivering either sophisticated systems of surveillance and self discipline, or rationalised, deskill work respectively. In the following case study, we examine the goals management had in introducing a new software system into a large call centre. Just as importantly, we analyse the effects that these changes had on work and management in the organisation.

The Case Study: Source Power

*Source Power* (a fictitious name) is a large company that provides both electricity and natural gas distribution to a large metropolitan region in Australia. Under previous guises, it was the sole public utility provider in the state, but following political processes of de-regulation and corporatisation, it now operates upon a more commercialised footing. As part of the embrace of a more competitive market, the company’s 27 service depots were closed in the mid 1990s and a new centralised business centre, complete with call centre functionality established in their place. In preparation for what was anticipated to be a fully competitive environment and with the aim of providing ‘one-stop’ customer service the call centre quickly grew to a staff of 170 customer service representatives (CSRs).

Data collection for this study consisted of job observation, interviews with the call centre manager and managers of training, technical integration and resource planning. Three focus groups of employees and one focus group of team leaders were also convened in order to ascertain a clearer picture of employee and team leader experience with the new software platform. In the following sections we examine how technological change in the form of new software affected functions, which are common to all call centres.
What Did Management Want?

CSRs at Source had used a DOS based ‘billing engine’ called Facom in their transactions with the public. This was principally an accounts based software system that allowed jobs to be logged and accounts maintained for residential and business addresses. It was these addresses which provided the IDs that the system operated upon. Like other ‘green screen’ systems, Facom was code based. Any query or operating function required the input of a specific code in order to accomplish a given task. Training largely entailed familiarisation with the almost 400 codes that drove the system. The eight weeks of training, much of it on keyboard and navigational skills, was considered excessive. Thus, one rationale for introducing a new support platform was to halve the initial training period with the introduction of the successor system.

The existing technology was also a comparatively open system for its users in a number of respects. In responding to customer queries, the CSR had to know where to go into the system, as well as what questions/codes to enter in order to retrieve the required information. This placed a premium upon navigational knowledge and skills. CSRs who were adroit with using the system could register much better call handling statistics than the uninitiated. In fact, operations were to a significant degree dependent upon the de facto ‘ownership’ that CSRs took of their own call handling processes and the tacit knowledge it was premised upon. The process was informal and this lack of standardisation was a concern to management, who had previously embarked upon the task of putting together a formal process manual. Management was dependent upon the CSRs for the knowledge that was codified into the process manual, while in turn agents were directly involved in authoring the manual.

Employee experience that was used to create the call centre’s process manuals could also be used to deviate from operating procedures when this was considered necessary and this was a major concern at the centre. With Facom there were no prompts or scripting to guide the CSR through a standard set of procedures. What the agent did was entirely guided by the conversation with the customer and her ability to use the system to generate results. The skills involved in taking, entering and retrieving information, while simultaneously maintaining a friendly comportment should not be underestimated, nor should the discretion which the existing system permitted the CSRs to use in providing service. Such autonomy was manifested in a number of ways, including deciding the level of security deposit required for new accounts, and taking decisions as to whether to disconnect or reconnect an account as well as setting the conditions for dealing with arrears and repayment schedules for overdue accounts.

Under the existing platform, each agent would complete a job by entering text into the system and this in turn would trigger specific actions in the field. What was entered was controlled by the CSR. This gave rise to managerial concerns regarding both consistency of information and action, which were judged to be too dependent upon individual knowledge, memory and proclivity. These issues informed additional managerial unease. The existing
The Customer Management System (CMS) was launched in 2001 with the intention of rectifying the perceived shortcomings of Facom. The change was to provide better customer service in an age of deregulation and competition. CMS was said to be customer focused rather than house or residentially focused. As Source began to redefine itself as a business as opposed to a public utility, this was a key consideration. CMS permitted better data gathering and data mining opportunities owing to the fact that its trigger was the customer rather than the individual residential address.

Importantly, the installation of CMS did not mean the end of Facom. Rather, the old system still remained the active repository and source of customer data. But now, instead of CSRs interacting directly with the data, they would do so through the CMS software, which was overlaid on the existing platform as the ‘interpreter’. Unlike the predecessor software, the new system was based on scripted text. Removal of dependence upon individual memory was viewed as an important attribute of the new system. It was anticipated that computer generated scripting would assist training time reduction and remove an important source of influence exercised by more experienced workers over new trainees.

More significant than window scripting however, were the new controls that were embedded in the system. Previously, CSRs assumed the critical navigational role in both accessing and inputting information into the system. In this work, the CSR was required to provide interpretative services as the link between the customer and the technology. With the adoption of CMS these functions were downgraded. Rather than using the system, there was a greater emphasis on meeting its requirements. This would seem to present yet another example of deskillings (Braverman 1974), along with the adoption of greater levels of technological control (Edwards 1979; Callaghan and Thompson 2001) whereby standards and procedures are embedded in the means of production that employees use. However, in the context of an information industry, moves to standardise procedures through vesting control in new technologies may have interesting, if unforeseen, consequences. If the CSRs were no longer able to take the decisions that they had been trained to take, they were having to take other decisions that would have an impact upon the objectives management had set forth.

**New Skills in Customer Service Delivery**

The most notable, if unanticipated, impact of the new software system was a ‘blow out’ in the length of call queues and the corresponding wait that customers had for service. There were several reasons for this. First, it was not a case of one technical system being replaced by another, in which event increases in call handling times may be temporary. Rather, a new front-end system was ‘wrapped around’, the existing structure. Each inbound call came ‘packaged’ in the new software, which is how the agent received it. But,
information was still stored in and eventually entered into existing databases. For many queries the agent would have to go back into the old system in order to retrieve necessary data to progress the call. In other instances, the CSR would select to return to the original system, because this was deemed more efficient. CSRs now, in effect, had to use two systems for much of their work. The difficulties encountered by having “a customer based system on premise based product” were a common refrain, as were explicit criticisms of the new commercial focus and the affects it was having on technology design as well as basic customer service.

Agents also found the lateral free flow logic of the original software to be more adept for certain types of work than the ‘stem and branch’ logic of CMS. The former allowed workers to flip between screens and to carry information over from one screen to the next. It also permitted agents to move directly to the screens they knew they needed to complete a job. With CMS, agents were required to proceed in a specific linear order, regardless of the relevancy of certain screens and queries to the call at hand. It was also impossible to backtrack in CMS, meaning that information that had been displayed in previous screens could not be recovered if needed later in the call, thereby requiring workers to revert to pen and paper for recording important facts. This slowed processes down, making for frustrated CSRs and irate customers.

Front line workers at Source were certainly aware, and critical of the commercial logic that was driving technological change. The new customer focus was viewed with scepticism precisely because it was not delivering services as efficiently as previously. Others suggested that preparation for the new de-regulated environment had prematurely hastened the introduction of a system that was not adequate nor had not been properly piloted. This in turn, undermined service, whilst making workers appear incompetent to the public. Control had usurped service and this produced frustration and bitterness. CSRs were caught in the middle, between a clientele exasperated with excessive queues, an inflexible technology and management who had deep economic and psychological investments in the new system.

Under these circumstances, it is unsurprising that workers would develop strategies for dealing with the increasingly contradictory requirements of meeting service expectations within prescribed target times. The most intriguing aspect of this is what CSRs described to us as the activities of ‘lying to the computer’ and ‘cheating the system’ in order to fulfil job demands. These are declarations that were continually and spontaneously used by focus group members in each session. Lying could be used to speed the system up, when the system was not responding in an appropriate fashion, or when the options it was presenting were inadequate to deal with a problem. Other employees would lie to CMS to get past blocks that were part of the new customer anchored focus of the software, but again, to let them do what they defined as their real job. In their own words,

“We have to write the wrong way to do the right thing.”

“You’ve got to cheat it all the time, lie to it ... you got to lie.”
Successful ways around the system were quickly passed on from agent to agent through informal networks:

“...the other day one of the guys upstairs said to me, ‘hey have you ever tried this, if you just put... “cc” in the suburb it actually skips a screen and brings you to where you wanta be ... and you think, hey I am lying to this machine so well that I can even skip a screen that was absolutely useless anyway ...”

Management was not blind to these emerging dynamics either and some adjustments were quickly made. Grade of service targets were recalibrated to reflect average call handling times as opposed to the managerially imposed targets. Additional staff were hired and plans to fully utilise the new software in limiting CSR autonomy were judged unworkable. Tying the hands of the CSRs too tightly quickly led to management overload, with impractical numbers of disputes with customers being passed up to team leaders for resolution. Once this was evident, the blocks on employee discretion were quickly removed from the new software and pre-existing protocols were restored.

Discussion

The introduction of a new customer service software system at Source had mixed and conflicting outcomes on the operations of the call centre, while management was ill-prepared for this. This forces us to rethink the stereotypes that we have of technological change, as the rational unfolding of managerial intent, opposed only by worker recalcitrance. Although the intention was to simplify training and customer service work results fell well short of this on a number of counts. The new system was more compatible with both on the job training and self-paced modular learning. However, CSRs now had to know two systems instead of one and learn how to transverse the problems that were generated by the new technology in its problematic integration with the old. As a result, there was no decrease in training time.

In principal CMS required less skill to operate. Amongst workers there was a sense that the new software entailed a loss of operational finesse. Simply put, it told the CSR what they had to ask and where they had to go. The problem, of course, was this was not always where the agent needed to go. So, offsetting the de-skilling logic of the system were the new skills of counter-manipulation – ‘lying to the computer’ and ‘cheating the system’ – that had become a necessary part of maintaining customer service. Accordingly, expectations for the new software were not delivered and discretionary judgment had to be restored to the agents. Instead of over-riding the interpretative skills of CSRs, new integrative skills were added into the mix, whereby agents were responsible for maintaining a functional relationship between the two software systems. As precisely summarised by one member:

“...you need more skill ... you need to know not only how basically to serve the customer appropriately, you need to know how to put it in the system, cheat CMS and also make sure everything is in Facom in the end, because it all has to end up in Facom...”
Managerial commitment to the new system was total and unwavering. It is equally clear that management did not have well defined templates for the optimal use of CMS. It is also obvious that they were caught off guard with respect to the impacts that the new system would have on levels of customer service, or how it would affect the operation of individual performance indicators and the employee bonus plan that was attached to them. Hence, shortly after CMS was installed, management embarked upon unplanned and *ad hoc* observational work studies of employees who *were thought* to be using the system most effectively. This suggests the iterative nature of the technological change we are studying.

This case study also has clear implications for how we think about quality in contemporary service provision. Taylorism, has not traditionally had a quality focus. Rather, the guiding assumption was that jobs could be so simplified that quality would no longer be an issue. In customer service work, such assumptions are often not tenable. The importation of CMS software at *Source* was all about achieving greater standardisation in the responses that were given to customers and in the economies that are thought to accompany lower levels of non-random variation. This, however, still poses challenges for realising quality. The resolution of customer service problems and the delivery of something that the public would consider as quality service may entail precisely the kind of deviation away from standardised scripted experiences that Total Quality Management strives to achieve.

The *immediacy* of the customer relation in extended voice-to-voice interactions, an attribute that is missing in the world of manufacturing industry, accounts for the efforts that workers were willing to make, as well as the ingenuity they exercised in ‘cheating’ the new system on behalf of the client. In this sense, the workforce at *Source* had a more developed notion of quality than many of the exponents of TQM.

**References**


