

6 STEPS TO SET UP A

Call center for success



Prologue

In 2015, **David Borrie and Mikey Hammerton** founded a recording studio in an abandoned police station in Bristol. Their time-sharing concept instantly struck a chord with musicians. In just four years, they expanded to **21 locations**. Today, Pirate Studios cater to **50,000 musicians, globally**.

Initially, they were outsourcing their customer service operations. But as their business grew, they realized that this was negatively affecting customer experience. So, they hired their own team, signed up for a call center software, and built their own call center for customer support. Now, how did this help them?

Their agency used to maintain an Average Speed of Answer **(ASA)** of **90 seconds**. They were able to bring it **down to 3 seconds**.



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Can you set up an in-house call center?

Businesses have traditionally had more than one reason to outsource their call center operations instead of setting up their own:

- Call centers were seen as cost centers.
- The infrastructure costs were prohibitive.
- Maintenance required skilled personnel.
- Hiring talent was hard, and training even more so.

Providing localized support, globally, was something only enterprise companies could dream of in their philosophy. However, this situation has dramatically changed in the past few years, and **two factors** have contributed heavily to this.

Factor 1

The perks of customer retention

Businesses are increasingly recognizing the link between profit and customer service, and how it's governed by the 'economics of loyalty' — as most of us now know and have experienced, it is 5x to 25x more expensive to acquire new customers than retaining existing ones. Companies are not just building their own customer support teams but also supplementing them with customer success functions to reduce churn and increase recurring revenue.

Factor 2

The rise of cloud telephony

The advent of cloud-based call center software, has removed the dependency on infrastructure and premise-based phone systems. It has also made call center operations location-agnostic, making customer support at a global scale feasible for small businesses too.

6 steps to set up a call center

- **Step 1:** Choose your call center software
- **Step 2:** Retain or buy phone numbers
- **Step 3:** Add a team, assign roles
- **Step 4:** Route your calls and design your call flows
- **Step 5:** Identify bottlenecks
- **Step 6:** Report and retrospect

Step 1

**Choose your
call center software**



Your call center software is the foundation of your call center setup.

There are several types of cloud phone systems with different sets of specialized features — some cater to call centers, others are used for business communication or intra-office communication, a few cater to all. So, it is crucial to make the right choice.

One of the easiest ways to identify a call center software from the different kinds of phone systems is to look out for the following must-have features:

Checklist of must-have features in a call center software

Feature	Why you need it	Type of call center
IVR	To route callers to the right team or department	Inbound
Call queues	To make sure that calls ring to the right department	Inbound
Live dashboard	For supervisors to get a live overview of calls, callers and agents	Inbound/Outbound
Helpdesk integration	To convert calls to tickets	Customer Support

Checklist of must-have features in a call center software (contd.)

Feature	Why you need it	Type of call center
CRM Integration	To convert calls to leads or append information to deals	Inbound
Dialers	To automate dialing	Inbound
Call center reports	To easily assess the health of your call center, track agent performance, and also understand call volume trends	Inbound/Outbound
Call recording	For documentation as well as agent training	Inbound/Outbound

Apart from must-have features for your call center software, here's a set of features you need if you want to provide the best user experience to your callers:

Checklist of features to provide the best caller experience

Feature	Why you need it	Type of call center
Service level monitoring	To make sure that all your calls are answered within an agreed-upon time limit	Inbound
Transferable call notes	To ensure that callers do not have to repeat their issue or query when they are transferred to a new agent	Inbound/Outbound
Custom messages/ greetings	To welcome your callers and guide them through your call flow	Inbound/Outbound
Call masking	To mask your business number with a mobile number or local number. This helps in providing a localized experience and also in improving your hit rate	Inbound

Step 2

**Retain or buy
phone numbers**



Setting up a new call center need not necessarily mean that you have to change your existing business phone number. There are two ways to retain your old number:



Port your number(s)

to the new call center software, if
are okay with switching your
carrier



BYOC

(bring your own carrier), if you'd
like to retain your carrier

Number Porting vs BYOC

With number porting, your calls will be charged based on the call rates of your new call center solution. BYOC means that you'll continue to pay the same *call charges* you were paying to your existing carrier. You can make your choice depending on which is more beneficial for you. Often, this choice is dictated by the geographies of your business.



Pro tip: You can also use call masking to mask your new numbers with your existing phone number, or vice versa.

Types of business phone numbers

If you are buying a new phone number within your call center software, you have the following options to choose from:

a) **Local phone numbers:**

Local phone numbers allow you to provide a localized experience to your callers and also keeps your call rates in check. Even if you are an inbound call center or an outbound call center, local phone numbers are key contributors to cutting your costs associated with your call center.

Buying a new phone number

The screenshot shows a web-based admin interface for a cloud phone system. The user is logged in as John Paul. The main navigation menu on the left includes: Rules, Numbers (selected), Business Hours, Call Flows, Messages, SIP Phones, Agents (Users), Teams, Service Levels, and Billing. The main content area displays a table of existing phone numbers:

NUMBER	LOCATION
(623) 552-2105	Arizona, US
(980) 247-4920	North Carolina, US

A 'Buy New Number' modal is open on the right. It has tabs for 'Local' and 'Toll-free'. The 'Local' tab is active, showing a search for 'United States' with a dropdown menu listing countries like Sweden, Switzerland, Thailand, Trinidad and Tobago, United Kingdom, and United States (checked). Below the search, a list of available numbers is shown, all from Alabama, US:

- (334) 518-6197
- (205) 430-5221
- (938) 238-2777
- (938) 200-9651
- (251) 255-9604
- (334) 510-6722

b) **Toll-free numbers:**

Yes, toll-free numbers will be more expensive for your business however it will make your business more accessible to your callers. It also helps in creating a perception that your business is customer-friendly since you are opening up a no-cost channel (for your caller) to reach you.

Businesses often use a combination of local and toll-free phone numbers for their inbound call centers.

c)

Vanity phone numbers:

Vanity numbers (1-646-FLOWERS, 1-347-HELPOU) are phone numbers that can act as a branding platform for your business. Their digits reflect some aspect of your business on the dialer/keypad, enabling easy recall and associations. They typically cost more than your local phone numbers.

Once you have your phone number(s) purchased or ported into your call center software, you are ready for the next step.

Step 3

**Add a team,
assign roles**



As always, technology is only one part of the solution. In order to make sure that your call flows are correctly set up in the present and your call center can be scaled up in the future, you need to add your team and assign them roles. Roles are of the following types:

a) **Admins**

Call center admins typically set up the call center software, makes decisions about pricing plans, decides if add-ons are to be purchased, users are to be added. They are responsible for the initial setup and also the scaling up of your call center along with the growth of your business.

Adding agents

Admin > Agents

John Paul
ON BROWSER

Agents

AGENT NAME	EMAIL ADDRESS
James Sebastian	james.sebastian8@gmail.com
John Paul	john.paul@freshworks.com

Agent Details

EMAIL ADDRESS
*james.sebastian8@gmail.com

ROLES

- Supervisor
- Account Admin
- Supervisor
- Agent
- Admin

b) Supervisors or managers

Call center supervisors or managers will be immersed in the day-to-day monitoring and management of the call center software and the agents or reps of the call center. They are also responsible for training, assigning business hours to agents, and performance reporting.

c) Agents or reps

Call center agents or reps will be making or receiving calls in your call center. They will be your frontline, constantly engaged with callers or customers.

You can create teams from the users you have added. Once you have your team and team-structure in place, you can focus on how your incoming calls will be routed.

Step 4

**Route your calls and
design your call flows**



The teams you just created should now be mapped to call queues.

A call queue is nothing but a setup to line up your incoming calls so that the next-available agent can answer them. Based on your requirement, you can also introduce IVR menus to your call flow.

As soon as a call is made to your call center, you can choose to send your caller to an IVR menu or a call queue. If you have multiple teams, you can start your call flow with an IVR menu, the caller can then choose (by pressing 1, 2, or...) which department they need to be put in touch with. In this case, each department or team (let's say, your support team for APAC) will be associated with a call queue.

Sending a call to an IVR or call queue

The screenshot displays a web-based interface for configuring call routing rules. On the left is a vertical sidebar with navigation icons for various system components. The main area is titled 'Admin > Rules' and contains a table of existing rules. An 'Edit Rule' modal is open on the right, showing configuration options for a specific rule.

Admin > Rules

Rules

NUMBER	BUSINESS HOURS	ACTIONS
(980) 247-4920	During	Send to Global Que...
(623) 552-2105	During	Send to Global Que...
	Holiday	Voicemail
(716) 261-2543	During	Send to Global Que...
	Holiday	Hangup

Edit Rule

NUMBER: *(980) 247-4920

BUSINESS HOURS: * 24 x 7

ACTION (DURING BUSINESS HOURS): * Send to Call Queue

- Send to Call Queue ✓
- Send to IVR Menu
- Send to Voicemail
- Hangup

One of the cool things that you can do with IVR menus and call queues is that you can set up your own custom welcome messages to delight your callers.

You can also set up fallback options if the assigned agents do not answer the calls. Some of the common fallback options in call centers are

- Send to voicemail
- Offer a callback
- Send to another queue

Or, choose to simply hang up without setting up a fallback option.

Creating call flows

The screenshot displays a web-based interface for configuring call flows. The top navigation bar shows 'Admin > Callflows > Asia Support'. A left sidebar contains various management options: Rules, Numbers, Business Hours, Call Flows (highlighted), Messages, SIP Phones, Agents (Users), Teams, Service Levels, and Billing. The main content area is split into two panels. The left panel is for 'Asia Support' and the right panel is for 'call queue 1'. Both panels have a 'CALL QUEUE NAME' field at the top. Below this, there are several configuration sections: 'PLAY MESSAGE...' with a 'Welcome Message' dropdown; 'CALLER WILL BE ATTENDED BY...' with 'Asia Team' (left) and 'John Paul' (right) dropdowns; 'ROUTE CALLS BY...' with 'Calling All Agents Simultaneously' dropdown; 'FOR SECONDS PER AGENT' with a value of '30'; and conditional logic blocks. The 'IF AGENT(S) IS/ARE ONLINE BUT NOT ANSWERING' block in the left panel has a 'DO THIS...' dropdown set to 'Send to Another Call Queue'. The 'IF AGENT(S) IS/ARE ONLINE BUT BUSY' block in the left panel has a 'DO THIS...' dropdown set to 'Hangup'. The 'IF OFFLINE' block in the left panel has a 'DO THIS...' dropdown set to 'Hangup'. The right panel has a similar 'IF JOHN PAUL IS ONLINE BUT NOT ANSWERING' block with a 'DO THIS...' dropdown set to 'Send to Voicemail'. Below the conditional logic, there are 'DO THIS...' dropdowns for 'Send to Voicemail', 'Hangup', and 'Hangup'. At the bottom of the interface are 'Cancel' and 'Save' buttons.

Call routing also depends on your office hours and holidays. To make sure that you are aware of all incoming calls to your call center, you can set up

- a. **Business hours routing** to handle calls that come during your office hours
- b. **After-hours routing** to send calls to your fallback options like voicemail, once your office hours are over
- c. **Holiday routing** to handle calls that come on holidays

Once you have these rules and flows in place, you can test how calls are being received by your call center and if they are reaching the right person.

Step 5

Identify bottlenecks



Supervisors play a key role in identifying bottlenecks in the call flows that you have set up. They can do it using a live dashboard that lets them monitor calls that are in conversations and calls that are in queue.

Some indicators of bottlenecks are:

- High number of abandoned calls
- Service level breaches
- Increase in hangups
- Phone calls that are taking longer than the average time expected

Once these bottlenecks are identified, you can try reducing them by

- Reducing the number of IVR menus if you have multi-level or nested IVRs
- Joining calls (call barging) where an agent requires inputs from the supervisor
- Introduce custom messages that assure the caller that their call will be answered soon
- Announce their position in the wait queue, and so on

These actions are, of course, not one-off. You'll need to keep monitoring and perform these tweaks in iterations. Soon, you'll be able to notice the improvement in your call center performance.

Step 6

Report and retrospect



The next and final step after monitoring is reporting — a retrospection of the outcome of everything you have set up and everyone who is part of your call center’s journey. While monitoring helps in identifying real-time problems, reporting is key to understanding the trends taking place in your call center, over time. Here are a few basic reports that can help you get started:

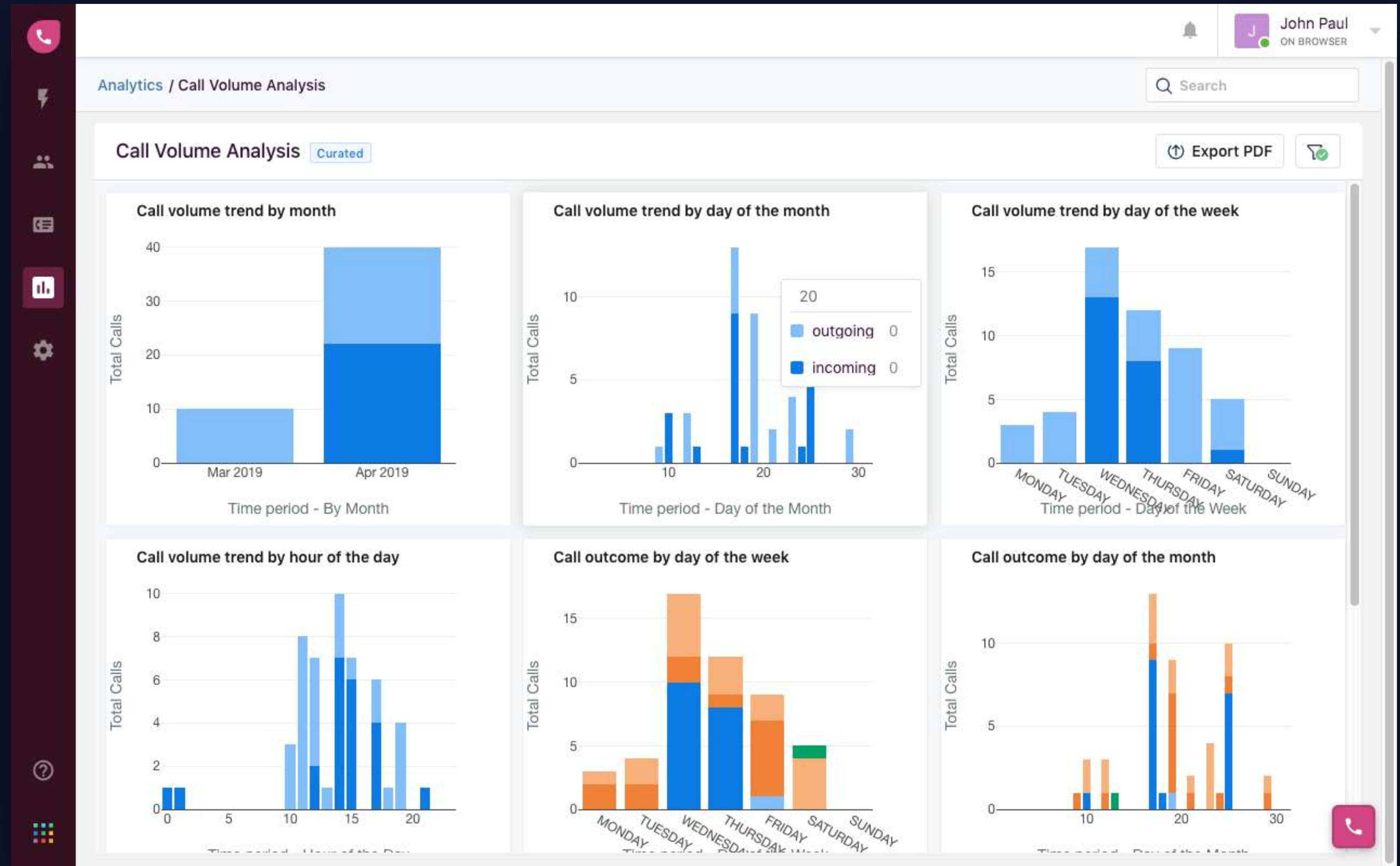
a) **Call center health report**

A call center health report will show you the total calls – answered, missed, abandoned, callbacks, sent to voicemail, etc. — over a period of time. It will also tell you the average wait time for your callers and also the average handle time of your agents.

b) **Call volume analysis**

Call volume analysis will show you call volume trends on a monthly, weekly or daily basis. This will help you perform agent allocation on days when your call center is experiencing high traffic. Call outcome trends are also typically reported in call volume analysis.

Reporting call volume in your call center



c) **Agent performance report**

This will show you how many calls are being answered by your agent, their average handle time and also the time they spend in after-call work. By looking at these call center metrics you'll be able to optimize the productivity of your agents and also appreciate them for their good work.

You can build these reports using your call center software. In **Freshcaller**, these are readily available as pre-built reports.

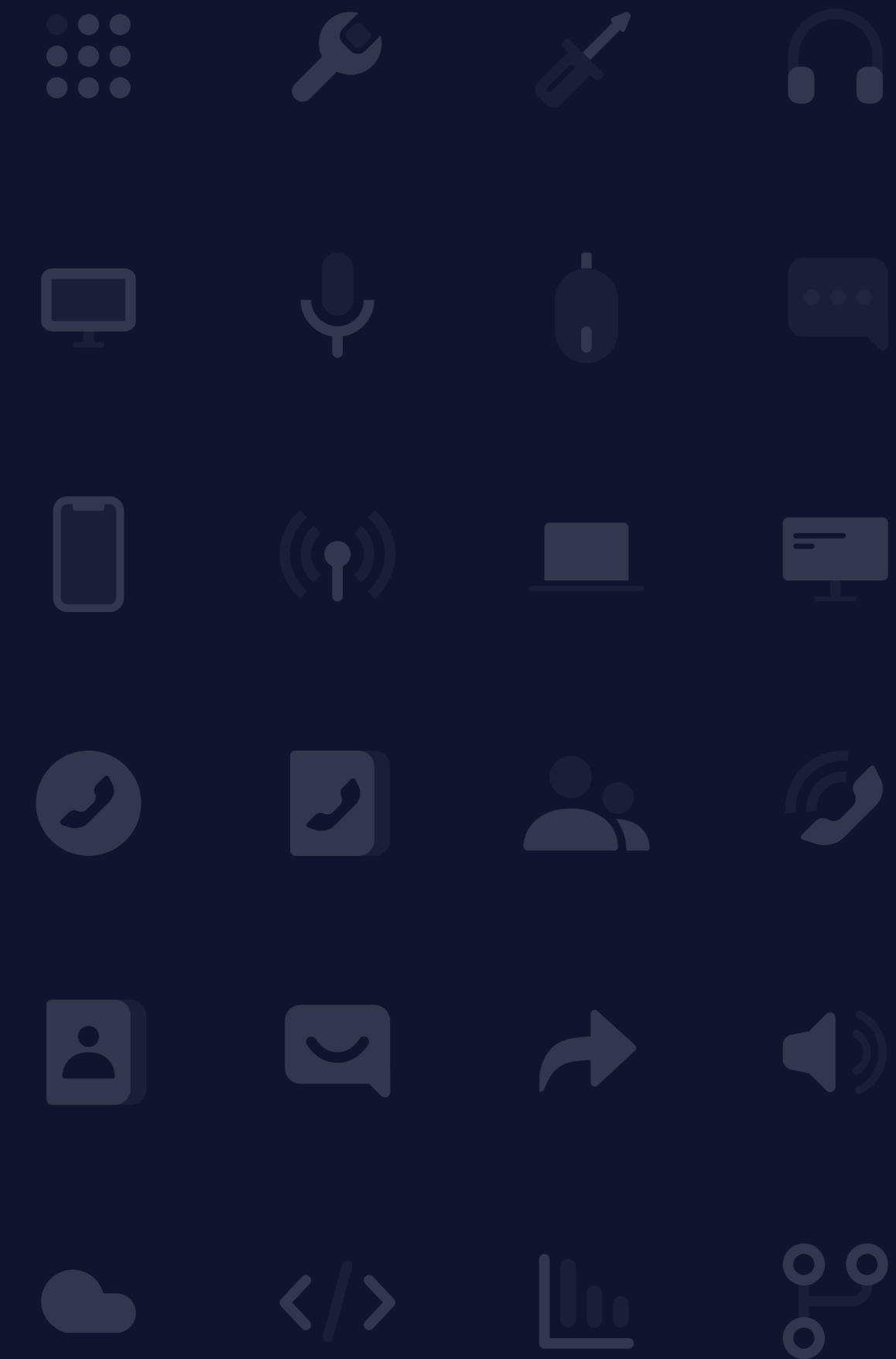
So, there you go. You currently have the recipe to setting up a successful call center. While it may not be as simple as mixing sugar, spice, and everything nice, it definitely can help you start from scratch and have your call center up and running in a week, if not days.

About **Freshcaller**

Freshcaller by Freshworks is a modern-day reimagining of our everyday phone system for customer support, sales, IT, and HR teams. With Freshcaller's cloud-based architecture, it brings together the best of legacy features like IVR and advanced capabilities like Smart Escalations, Custom Call Center Analytics to help you set up a state-of-the-art business call center. Freshcaller offers phone numbers in 90+ countries, requires zero phone hardware, and is extremely easy to use.

For more information visit:

www.freshcaller.com



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