Case Study

Fortune 500 Company: Transforming employee learning and customer service practices
Ethnography in action

“If you can recognize and leverage the idea of naturally existing communities of practice, training gets better because you’re not fighting human nature. Learning became more efficient and less expensive, and people like it better when you involve them in development.”

—Client’s manager of corporate professional development

“For the first time ever, we were able to solve all of a customer’s problems without having to pass them off to someone else. That made us and the customer very happy.”

—Client’s customer service representative

OVERVIEW: Situation Analysis
To improve customer service, reduce training costs, and boost revenue, a Fortune 500 company decided to merge their fragmented call center operations. They designed and built an experimental call center site that would provide all customers with a unified experience via a single 800-number. For call center staff, the company defined a single generalized role empowered to handle three specialized customer-service functions: technical support, account administration, and supplies sales. The corporate training department already taught a standard training curriculum, but employees would need extensive training to learn several new jobs.

That’s when PARC was brought in. The company engaged PARC ethnographers to propose, co-design, and implement a curriculum development process and skills training program for customer call center employees.

Work Practice Insight
Based on past field-study immersions in similar corporate environments, PARC’s ethnography team realized that the most effective curriculum development process and training program would capitalize on employees’ familiar work practices and the socially constructed nature of learning. The key to success, PARC ethnographers pointed out, would be the training program’s ability to provide shared, real-world context (“learning by doing”) and systematic peer mentoring opportunities (“learning by observing”). Such approaches would enable workers to broaden their knowledge bases through each other’s expertise – while still handling their ongoing responsibilities.
Process
The PARC ethnography team conducted a targeted work-practice study to understand and explicitly capture employee practices, customer requests, technical needs, cost limitations, and any physical or organizational constraints. After analyzing the study data, the PARC team situated employees from distributed call center departments into co-located workgroups. Next, they optimized the physical workspace to facilitate collaboration and mentoring, so employees could easily coach each other in handling atypical customer calls.

The PARC ethnography team also created and implemented “Phased Interactive Learning,” a novel peer-to-peer approach through which employees shift back and forth between distinct observational or “bite-size” training phases and hands-on work situations that let them use that learning – all while interacting with each other and systematically developing skills. In contrast to today’s traditional, remote, scripted corporate training approach, PARC’s program integrated and involved key stakeholders throughout the curriculum design process.

Results
Through a two-year engagement with the call center and training departments, PARC helped streamline the call center’s structure and operations, and helped:

- Save $20 million annually in training costs through program implementation throughout the technical service workforce
- Decrease training time by condensing learning from 52 to 15 weeks
- Reduce customer-service costs by resolving more issues via telephone instead of through customer site visits
- Exceed sales expectations for supplies
- Improve collection of past-due accounts and handling of administrative queries
- Increase customer satisfaction by handling calls in a more natural, conversational manner
- Increase employee satisfaction by expanding their cross-functional expertise

Overall, the PARC ethnography team helped the client revise traditional notions about employee capabilities and professional development practices. Designed to suit the social milieu of organizations and human learning, the Phased Interactive Learning program was adopted by the corporate training department for other employee education programs and since has been adapted for other organizations.

More Information
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A global center for commercial innovation, PARC (Palo Alto Research Center, Inc.) works closely with enterprises, entrepreneurs, government program partners and other clients to discover, develop, and deliver new business opportunities. Previously known as “Xerox PARC,” PARC was incorporated in 2002 as a wholly owned subsidiary of Xerox Corporation (NYSE: XRX).