Improve CSR productivity by inexpensively modernizing old computer applications

Does this sound like your company?

- The customer/warranty/product information applications used by Customer Service Representatives (CSRs) were developed 10 – 20 years ago.
- The IT staff that developed the systems are long gone, and missing documentation makes it difficult to modify them to add functions now required by the business.
- These applications use character-based "green screens", making it difficult for the CSR to navigate through them.
- CSRs must hunt through multiple systems to get the answer to a customer query (while the poor customer is sitting on hold).
- New CSRs require a long time to learn how to use these systems, because the "Internet generation" are not used to green screens.

The simple answer to these problems would be for the company to replace these old systems with a modern Web browser based system. Unfortunately, this can be expensive and companies have other priorities, so the Customer Service department usually has to live with the problems.

However, there is another approach to addressing these problems that need not be expensive. There are many system tools on the market from vendors such as IBM, Attachmate, and Seagull Software that allow companies to put a Web browser front-end in front of the old green screens, leaving the underlying application untouched. Plus, it is easy to add new functions on top of the existing applications, without modifying the underlying programs.

The advantages of this approach include:

1. Significantly lower costs, compared to replacing the old system
2. Ability to retain the existing, working system for several more years rather than throw out a valuable asset
3. Increased staff productivity gained from using browser screen tools to cut down the time required to perform functions (e.g., hotlinks, tabbed folders, radio buttons, pull-down menus, valid value lists, help bubbles)
4. Reduction in the training time required for new staff
5. Ability to add required new functionality to the underlying system, without tinkering with the software code (which may potentially introduce problems)
6. **Most important**: Improved customer service, as queries can be answered more quickly

Here's a real-life example of a company that faced this situation.

The 500 CSRs in a department store chain warranty claims centre had to access customer orders, customer comments, and general notes stored in five separate *green screen* legacy mainframe applications. For the CSRs, this resulted in:

- long times searching for data when a customer called (up to 60 screens to wade through)
- low productivity, due to difficulty in searching and navigating through the screens
- high training costs for new staff
- customer satisfaction was low, since customers spent a long time *on hold* waiting for the CSR to mine for information
- difficulty in getting the full picture of client history and agreements made with the warranty and returns department
- dealing with customers who would *work the system* by calling many times to try to find a CSR who would agree to provide a warranty refund, since CSRs didn't have all the needed customer history data on a single screen
- frustration

Company management asked an outside firm to provide a quote to replace the five legacy applications with a modern, browser-based system. They were shocked at the price (well over $10M), and looked for an alternative.

VisionMAX used IBM's HATS (Host Application Transformation Service) screen-scraper application to gather information from the five legacy applications. The data is combined into four Web browser screens. At the same time, VisionMAX worked with the company's business analysts to re-engineer the call centre workflow and identify key functions that could be added to maximize productivity. VisionMAX used the VisionEngine rapid application development platform to create new functions that were added to the existing applications:

- ability to search through all five legacy system databases simultaneously, rather than one after the other, thereby cutting down the time to find a customer record
- stored the last 10 customers' information so that they could be retrieved immediately
- ability to put a customer record in the background when a new call came in, then return to it later during a quiet time to enter in notes from the previous call

VisionMAX completed the project in three months, at less than 1% of the cost of replacing the old applications. The information from the 60 green screens was combined onto four browser screens. Results:

- massively increased customer service productivity
- slashed customer service training time
- dramatically more efficient customer response time
- this all resulted in significantly improved customer satisfaction

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