

Mystery Calling: A Qualitative Application of the Lean Six Sigma Approach

Professor Dr. Latifah Abdol Latif

Professor Dr. Ramli Bahroom

Pooyan Yousefi Fard, MBA

Open University

Kuala Lumpur, Malaysia

Abstract

Service quality over the telephone is increasingly becoming a critical competitive factor to an organization's success. A previous study (Latifah A.L et al 2009) conducted in OUM found that learners rated the following two items "*university staff is easily contacted by telephone*" and "*toll free number for learner services center is easily reachable*" as least satisfactory. This indicates that OUM's telephone services need to be improved. To enable improvements to be made, the source of the problem needs to be identified. To achieve this, the Mystery Calling approach is used, whereby a total of 40 calls were made by a mystery caller to OUM staff. The responses from staff were rated based on a set of questions related to friendliness, professionalism, issue resolution, quality of response, and other commonly known problems generally faced by learners in telephone calling. The results are analyzed using the Lean Six Sigma 5-step method, that is, define, measure, analyse, improve and control (DMAIC) to rectify the problems encountered in telephone calling at OUM. The findings suggest that there is no standard procedure in answering telephone calls as evident by the variety of responses. In addition, it is also found that the calls were not attended to in an appropriate and timely manner. There is also a lack of knowledge on the part of the staff in terms of their inability to resolve the issues raised, not providing the relevant information and "passing the buck" to others. Finally, the attitude of the staff was found to be condescending in their dealings with learners. This paper recommends that a standard telephone response procedure be put in place and the relevant training be provided to staff. Recognising that the telephone is an ubiquitous form of communication among distance and widely distributed learners, removing their pain points in this service will immensely contribute to the enrichment of their learning experience at OUM. Finally, this study represents one of the many initiatives at OUM in attempting to improve its services to its learners in line with its learner centredness

Key words: Mystery Calling, service quality, higher education institution, Lean Six Sigma

Introduction

Service companies particularly higher education institutions (HEIs) are exposed to tensions stemming from increasing consumer demand levels as well as intensified competitive pressure. Customer service is an important issue for all types of organisations. For business organisations in a competitive environment, it is obviously necessary to pay attention to the level of service provided. Customers are free to choose alternatives, and so if they perceive that they will get better service at a competitor, they can transfer some of their custom. Relevantly, more and more service organizations are conducting customer research. But the problem which surfaces is that within the minds of individual customers, feelings can vary from intensely positive to intensely negative. Relevantly, traditional research methods, which assume that customers can verbalize their feelings are not sufficient in helping the service providers form a coherent picture of customer attitudes. The company needs to dig into customers conscious and subconscious minds. The researchers in this study aim to scrutinize factors that can improve efficiency and effectiveness of processes in the Centre for Graduate Studies. This is important in ensuring sustainability of the post graduate programs. The previous study conducted by a special committee in 2007 has scrutinized the viability of OUM's existing programs by a portfolio-analysis. Two of the four constructs employed in the portfolio analysis are student satisfaction and retention rate. The recent Importance –Performance survey conducted on the post graduate OUM students showed that students over all satisfaction were significantly influenced by 'Responsiveness' and 'Accessibility' dimensions. This forms the rationale for the present study. As a result improvement opportunities obtained will yield significant payback in terms of increasing customer contact time. This improvement may be identified by service functions applying Lean Six Sigma principles and tools.

Methodology

Theory of Mystery Calling

What is mystery calling? "We call this a 'tele-business card'. A customer's first contact with your organisation may be made through a telephone call. The way in which a potential customer is being addressed may determine his or her final view on your organisation. By using 'pseudo callers' or mystery callers, we will be able to find out how your staff deals with this 'business card'. However, not only verbal communication will be observed. We believe that even during a telephone call, non-verbal communication may affect the overall perception of quality, e.g. awkward moments of silence during a conversation over the phone."

Mystery Calling is a market research instrument for the objective measuring of the service quality at the customer interface telephone. It provides thus detailed and objective information about strengths, weaknesses and room for improvement at the customer interface. Related to a "real" service situation on the telephone this means that a test caller feigns interest at a service and lets himself be consulted regarding this. The test caller cannot be recognized as such to the call centre agent. This contact situation enables us to analyse and judge objectively those subjective experiences made by "regular" customers when using the hotline service. Mystery Calling is a hot topic and much talked about. Despite its widespread use and the increasing meaningfulness of the method, quality criteria,

methodical procedure and methodology problems of the test execution have hardly been discussed at all. (need to write more)

The Mystery Calling Interviews

Altogether, 40 test calls were carried out. All the calls were carried out by one caller. A pre-tests was carried out to develop a certain confidence and routine. In the course of these tests the importance of a certain routine and experience in order to be able to appear as a “genuine” customer, became quite noticeable. Thus the pre-tests were very important for the success of the examination.

The caller acted out different behaviour patterns. For example, the caller called a “pleasant and simple” customer. He has time, expresses himself politely and is very kind in some other cases "unpleasant, difficult" customer. He is impatient, permanently interrupts the call agent and doesn’t speak very clearly. The caller used different dialects as well as voices, acted friendly or unfriendly and appeared either patient or impatient. This considerably reduced the risk of being unmasked.

The Sample

The sample used in the study comprised of random 40 staff who answered the telephone calls of the mystery caller and real cases scenarios were questioned from them and they were rated according to the same questionnaires.

The Analysis

The data were analysed using Minitab for Windows version 15. The mean scores of each of the service items were calculated and ranked accordingly. A Sigma level analysis was conducted for certain questions which analysis come in the following.

Analysis of the Results

The questions of the questionnaire are analysed by Minitab to attain the six sigma level for each and every one of them. The results are evaluated with respect to standard procedure in answering telephone calls as evident by the variety of responses, attendance to telephone calls with regard to timeliness and appropriateness, knowledge on the part of the staff in terms of their ability to resolve the issues raised, providing the relevant information and finally, the attitude of the staff in their dealings with learners

During the 41 test calls the employees of the service hotline answered the phone in various ways and the welcoming sentence appeared in four different variations:

Table 1: Results of question 1

How does the staff greet and introduce himself t you over the phone?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid with the university name	23	57.5	57.5	57.5

with his/her own name	3	7.5	7.5	65.0
with the university name and with his his/her name	11	27.5	27.5	92.5
No greeting and introduction	3	7.5	7.5	100.0
Total	40	100.0	100.0	

These different expressions were also perceived as varying in kindness by the test callers. The last variant gave the respective test caller the impression that one was not particularly welcome as a customer. This form of welcome seemed very brisk and the employee did not arouse the feeling that he is "pleased" about customer's call.

Table 2: Table of the results of question 2

How friendly do rate the greeting of the staff?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Not so friendly	10	25.0	25.0	25.0
Friendly	28	70.0	70.0	95.0
Very Friendly	2	5.0	5.0	100.0
Total	40	100.0	100.0	

On average the "welcoming friendliness" of the employee was given 4 scale points on the rating scale. During the farewell greater fluctuations regarding "friendliness" than during the welcoming may be observed. The agents were evaluated as follows: 2.5% "very friendly", 65% "friendly" and 30% "not so friendly". The assessment "not so friendly" was made by the test caller who acted rather unfriendly and impatient himself. The test callers registered ten different farewell sentences.

Table 3: Results of question 5

What the staff said to you at the end of conversation?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid No comment	29	72.5	72.5	72.5
not apologetic at all, very snob, making the life difficult for a simple request	1	2.5	2.5	75.0
Thank you for calling	1	2.5	2.5	77.5
Thank you, bye	2	5.0	5.0	82.5

Refer to the responsible department/person	1	2.5	2.5	85.0
The staff said call back tomorrow and insisted on taking a message and finally he hung up the call	1	2.5	2.5	87.5
OK	3	7.5	7.5	95.0
Thank you for calling	1	2.5	2.5	97.5
OUM	1	2.5	2.5	100.0
Can not remember	1	2.5	2.5	100.0
Total	40	100.0	100.0	

Generally one can say that the farewells often seemed very colloquial and "simple" to the respective test caller. Questions like "Can I do anything else for you? or " Do you have any other questions?" were not asked by the employees in the context of this examination. Also kind statements such as "We would be pleased about a serving!" or "I wish you a success!" were not used.

Sig Sigma level

Six Sigma is an overall strategy to accelerate improvements in processes, products and services. The Sigma process capability is gauged by Minitab and the value ranges from less than 1 to 2 and then the failure incidents per million are calculated accordingly. The ideal Six Sigma has capability process of 2.00 with 3.4 Failures per Million. Figure 1 depicts the sigma levels.

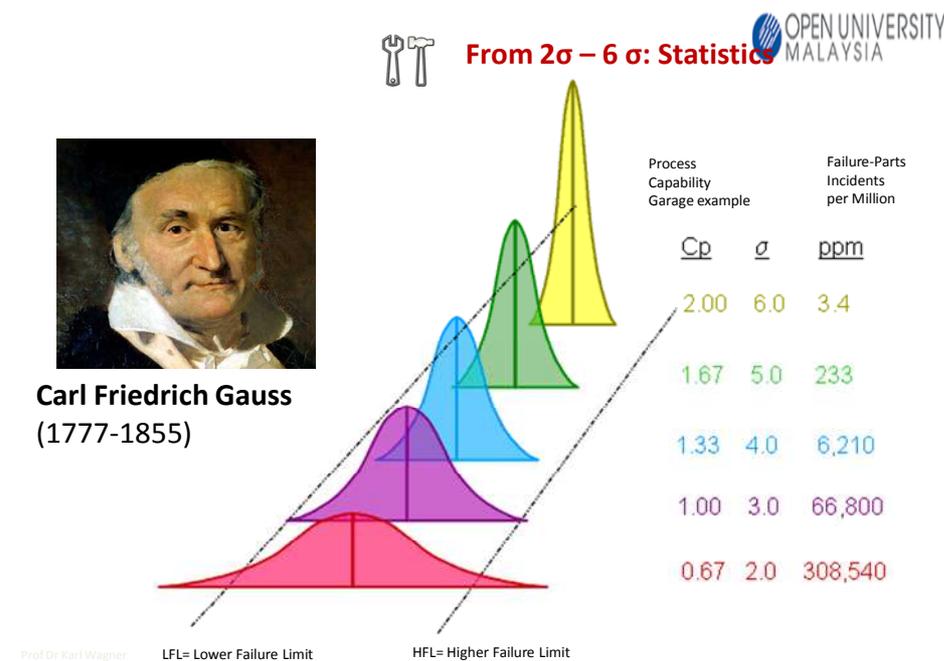


Figure 1

For the questions that sigma analysis is done by Minitab the results are provided in the following:

For the questions asking whether the staff answers the phone with appropriate speed, loudness as shown in Figure 2 and 3, Z.Bench (Sigma Level) value is 1.15 and 1.24 which shows the sigma level in the 2 sigma range.

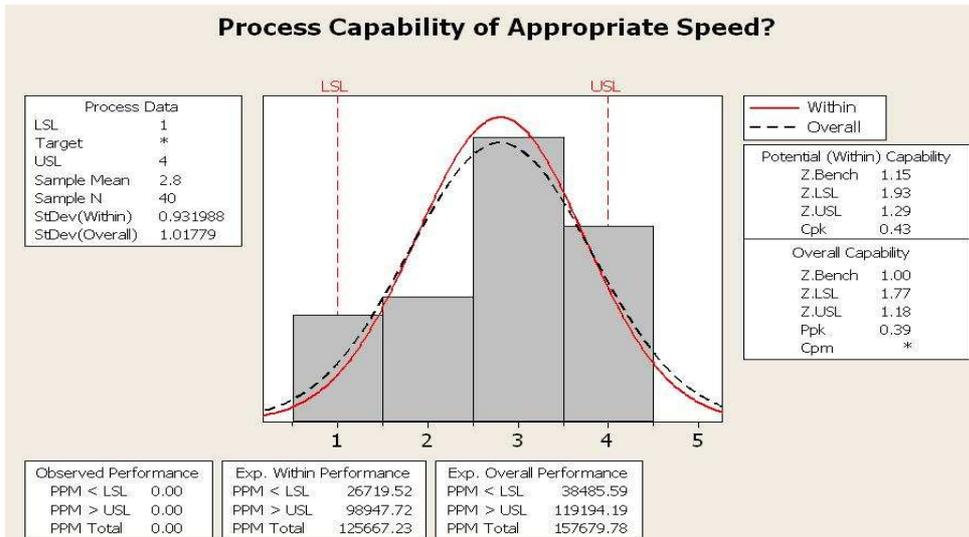


Figure 2

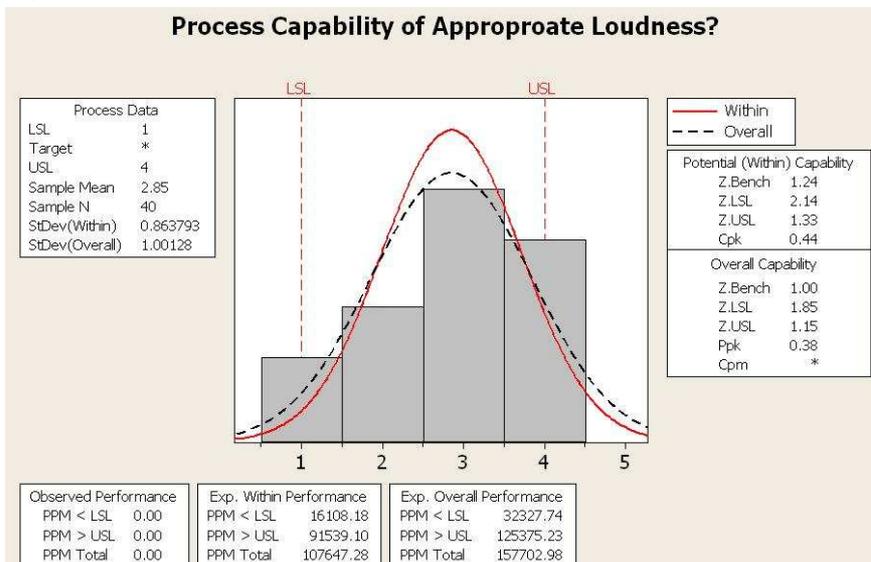


Figure 3

For the questions asking whether the caller was given enough attention, staff expresses himself clearly, and the staff has a pleasant voice Z.Bench (Sigma level) value ranges from 1.49 to 1.59 which shows the sigma level is closer to 2.

The highest sigma level is for the question about friendliness of the staff in ending the conversation and the value is 3 sigma as shown in Figure 4.

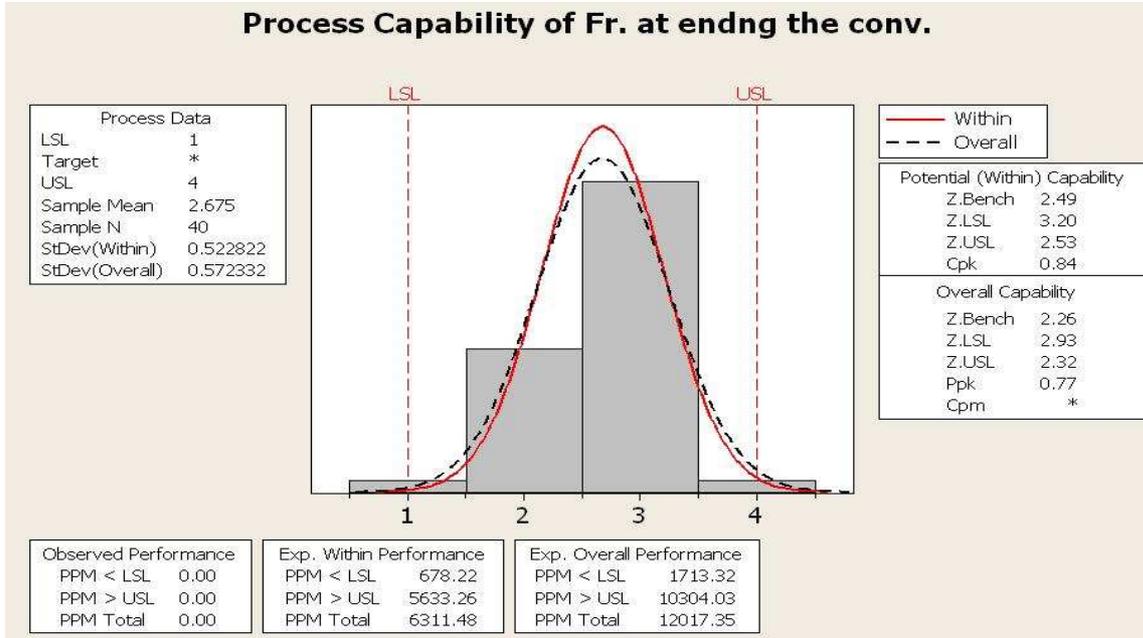


Figure 4

Service Process Improvement with Lean Six Sigma

Gaining Control over Process Complexity

The customer is advised to define service standards as a matter of urgency and to also communicate these sufficiently clearly. If the employees observe these standards, then improvements will be noticeable in all agent dependent ranges of capacity. The following summarises a couple of suggestions on possible service standards:

- We welcome our customers and also the colleagues with a smile. (Even if the customer does not see you, he will feel their smile.)
- Personality on the telephone – we’re there for you!
- Quality is not a matter of chance -- we want you to be 100% satisfied with our service.
- You can rely on us -- we help you with expertise, commitment and dependable information.

Welcoming and farewell

It is recommended that the customer introduce a standard greeting. This should have the caller recognize that he is a welcome customer. The following are just two possibilities:

- Welcome at OUM, my name is *name surname*;
- Good morning (emphatic); welcome at the service centre of OUM, my name is *name surname*, May I help you?

The employees should be trained to find an adequate exit from the conversation and to say farewell friendly. He/she should adapt to the course of the conversation. If the customer concluded an inquiry the employee says thanks for calling and points out to the caller that he is welcome to call the service number in case of any further questions.

If it seems fitting, it is nice and shows interest that the employee asks:

- Do you have any further questions which I can answer for you?
- Can I perhaps do anything else for you?

Conclusion

This work dealt with the market research instrument "Mystery Calling" for the measuring of the service quality on the customers' interface - telephone. Starting point of the considerations was the hypothesis put forward at the beginning: "Mystery Calling is a suitable instrument to examine the processes of service in the telephonic customer contact and particularly to measure the quality of this service!" At first theoretical bases were worked out. It became evident that the preparatory phase (specification of the research design) takes most time by far. The more polished the design of the research, the simpler and easier the test execution and result evaluation. The information gained in the theoretical and practical parts allow a confirmation of the hypothesis put forward, Mystery Calling is a suitable instrument for the measuring of the service quality at the customer interface telephone. This said, further research with regards to procedure, test execution, methodology, the evaluation of results and the fault analysis is clearly needed.

"Objectivity is the characteristic of Mystery Calling!" -- This is the predominant opinion among the experts. Until now, only few voices have spoken out critically. The telephone contact situation is a human meeting with a personal, differently coloured quality. This work clarifies that not everyone can be a call centre agent. Specialists must be employed at the interface to the customer. The attitude of enterprise management that pupils, students or temporal workers (without qualification) could work in a call centre is not up-to-date and harms the image of the university. Institution's awareness of this issue will change or increase within the next years and "Mystery Calling" therefore will experience a boom.

References

- Holtgreve, Ursula** (2002): *Re-Organising Service Work, Call centres in Germany and Britain*, first ed. Ashgate Publishing Burlington
- Bodo, Böse** (1999): *Call center Mittelpunkt der Kommunikation*, first ed. Vieweg Braunschweig
- Hazlerig, Al** (2007): *Introduction to Mystery Shopping*, first ed. BooksUrge Charleston South Carolina
- Dr. Newhouse, Ilisha S.** (2004): *Mystery Shopping made simple*, first ed. McGraw-Hill New York
- Semel, Johannes** (2006): *Mystery Shopping*, first ed. Tectum Verlag Marburg
- Deckers, Ralf** (2006): *Mystery Shopping*, first ed. Business Village Göttingen
- Kemp, Sid** (2006): *Quality Management Demystified*, first ed. McGraw-Hill New York
- Hummel, Thomas** (2002): *Total Quality Management*, first ed. Hanser Verlag München

- Prof. Dr. Rothlauf, Jürgen** (2004): Total Quality Management in Theorie und Praxis, 2nd ed. Oldenbourg Verlag München
- Bass, Issa** (2009): Lean Six Sigma, Using Sigma XL and Minitab, first ed. McGraw-Hill New York
- Bass, Issa** (2007): Six Sigma Statistics, With Excel and Minitab, first ed. McGraw-Hill New York
- Williams, Mary A.** (2006): Six Sigma, Pocket Guide, first ed. Lexington MA USA
- Birkmayer, Suzanne** (2007): Six Sigma, Toolkit, first ed. Janetschek Verlag Wien
- George, Mike** (2004): What is Lean Six Sigma?, first ed. McGraw-Hill New York
- Gygi, Craig** (2005): Six Sigma, Using Sigma for Dummies, first ed. Indianapolis Indiana USA
- Pande, Peter S.** (2000): The Six Sigma Way, How GE, Motorola, And Other Top Companies Are Honing Their Performance, first ed. McGraw-Hill New York
- Bergbauer, Axel K.** (2004): Six Sigma in der Praxis, first ed. Expert Verlag Renningen
- George, Michael L.** (2005): Lean Six Sigma, Pocket Toolbook, first ed. McGraw-Hill New York
- Töpfer, Armin** (2009): Lean Six Sigma, Erfolgreiche Kombination von Lean Management, Six Sigma und Design for Six Sigma, first ed. Springer Verlag Berlin
- Eckes, George** (2001): Making Six Sigma Last, first ed. John Wiley New York
- Lunau, Stephan** (2007): Six Sigma + Lean, Toolset, 2nd ed. Springer Verlag Berlin
- George, Michael L.** (2003): Lean Six Sigma for Service, first ed. McGraw-Hill New York
- Töpfer, Armin** (2009): Six Sigma, Konzeption und Erfolgsbeispiele für praktizierte Null-Fehler-Qualität, 3rd ed. Springer Verlag Berlin
- Töpfer, Armin** (2004): Lean Six Sigma, Erfolgreiche Kombination von Lean Management, Six Sigma und Design for Six Sigma, first ed. Springer Verlag Berlin
- Rehbehn, Rolf** (2003): Mit Six Sigma zu Business Excellence, first ed. Publicis Corporate Publishing Erlangen
- Magnusson, Kjell** (2001): Six Sigma umsetzen, first ed. Hanser Verlag München
- Harry, Mikel** (2000): Six Sigma, Prozesse optimieren, Null-Fehler-Qualität schaffen, Rendite radikal steigern, first ed. Druckhaus „Thomas Müntzer“ Bad Langensalza
- Rumsey, Deborah** (2004): Statistik für Dummies, first ed. Wiley-VCH Verlag Weinheim