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ABSTRACT

Contact centers are increasingly assuming a role in the relationship among organizations and customers. This is a sector that has a considerable growth around the world pushed by the telecommunication deregulation and by the need to improve interaction with customers. This phenomenon is amplified by the competitiveness between organizations. In recent years the Portuguese centers have moved internally within the country. The decision of relocate internally the CC results of the strategic management of organizations and is seen as a possibility of increasing the competitive advantages and as an opportunity for improving the quality of service indicators. Therefore it is important to identify the strategic and operational characteristics of an internal relocation of a Contact Center. This study provides insight about the best practices and the benefits found, the main achievements, and the impact on relationship between the customer and the organization.

Keywords: Contact Center, internal relocation, competitiveness.

INTRODUCTION

Increased competition among organizations is a current phenomenon. It stimulates the development and implementation of strategies to obtain a competitive advantage and add value to products and services offered by organizations. The importance of service quality reaching customers' satisfaction is mentioned by authors such as Zeithaml and Bitner (2000), Ohmae (1988), Bateson and Hoffman (2001), and Lovelock and Yip (1996). Dynamic and demanding markets combined with higher expectations of societies more and more technological, leads organizations for the creation of a service capable of capturing and retaining customers through various forms of communication such as the Contact Center (Corrêa, 2001 and Brown, 2001). This sector has shown significant growth in the world and Portugal is no exception (Benchmarking, 2008). The deregulation of telecommunications, the technology improvement and the need to better serve the customers are some of the main reasons why organizations have invested heavily in Contact Centers (CCs) which makes this sector increasingly attractive and also more competitive. The internal relocation of CCs, emerges as a way to improve competitiveness. This relocation is assuming a prominent role in the strategic actions of organizations.

The analysis of this reality highlighted the importance of identifying the best practices of the process of internal relocation of contact centers, the main aspects to consider, the benefits, the costs, the impacts and the changes.

In the following sections is shown the framework, the matters discussed, the purpose of this research study, the methodology and key findings.

RESEARCH OBJECTIVES

The definition of a strategy reveals what the organization intends to do and achieve in the market where it is. Porter (1986), Prahalad and Hamel (1995), Hax and Wilde II (2001) and Kim and Mauborgne (2004) discuss strategic thinking and strategic options for the organizations. The quality of customer-organization relationship may be vital to the survival of

organizations, leading to an intrinsic need for restructuring (Bretz, 2000). Offering services through the use of the telephone has grown dramatically all over the world, accelerating the growth of the CCs (Borst, Mandelbaum and Reiman, 2004). This is the predominant and preferred way that organizations use to communicate with their customers (Gans, Koole and Mandelbaum 2003). The effectiveness of CCs is strongly related with the use of software and hardware solutions that contributed for the convergence between telecommunications and information technology (Hawkins et al, 2001, Strouse, 1999). The mobility of the operations in this sector became a paradigm of globalization as they show similar characteristics in all countries and regions (Global Call Center Report 2007). Large quantities of interactions support the sales process, the marketing, the customer service, the technical support or other specific activities, resulting in an efficient way for companies to organize their contacts with customers (Sakamoto 2001, Dormann and Zijlstra 2003). The organizational context of this sector is marked by successive increments, promoted by organizations seeking to differentiate themselves from the competitors (Grandey, Dickl and Sin 2004).

The relocation will allow the appearance of global CCs. In this context outsourcing is becoming sophisticated and viable regardless of the specific function (Erik Granered, 2005, Gottfredson, Puryear, and Phillips 2005). Relocate may offer a variety of benefits such as reducing overall costs with infrastructures and human resources, increased quality and innovation, using latest technology. It can be seen as the migration of part or all the value chain, to a place with lower costs (Linder, 2004, Robinson and Kalakota 2004). The authors state that the scope of the offshore to reduce costs and arbitration skills depends on the advancement in telecommunications that make possible the establishment of back-office operations in a variety of locations, thus taking advantage of low labour costs.

Off shoring is increasingly emerging as an imperative strategic in the evolution of business models and the ability to progress as regards (Gupta & Mukherji, 2007, Aron and Singh 2005). Boehe (2008) advocates the

creation of competitive advantages by developing the use of the offshore market, combined with outsourcing location.

The use of relocation comes in part from the proliferation of Information Technologies and Communications (ITC) fuelling the trade in services and decreased costs of providing services across geographically distant locations (Papinniemi et al., 2005). ITC also allows disaggregating the value chain through the use of outside suppliers, gaining advantage in reducing costs (van Marrewijk et al., 1996). The CCs are known for high turnover rates, and a current priority it is training and retaining the workforce to ensure consistency of processes in the long term (Batt, et al. 2005).

The definition of a strategy discloses what the organization intends to do and achieve in the market where it is. Porter (1986), Prahalad and Hamel (1995), Hax and Wilde II (2001) and Kim and Mauborgne (2004) present how an organization can formulate its strategy. The quality of the customer-organization relationship can be vital to the survival of organizations, which leads to an intrinsic need for restructuring (Bretz, 2000). The performance of services, through use of the telephone, has grown dramatically throughout the world, accelerating the growth of the CCs (Borst, Mandelbaum and Reiman, 2004). This is the predominant and preferred way used by organizations to communicate with their customers (Gans, Koole and Mandelbaum 2003). The effectiveness of CCs is strongly related with the use of software and hardware solutions from the development of IT allowing the convergence between telecommunications and information technology (Hawkins et al, 2001, Strouse, 1999). The mobility of the operations in this sector became a paradigm of globalization as they show similar characteristics in all countries and regions (Global Call Center Report 2007). The Contact Centers manage large quantities of interactions to support the sales process, the marketing, the customer service, the technical support or other specific activity, resulting in an efficient way for companies to systematize their contacts with customers (Sakamoto 2001, Dormann and Zijlstra 2003). The organizational context of this sector is marked by successive increments, promoted by

organizations seeking to differentiate themselves from their competitors (Grandey, Dickt and Sin 2004).

The relocation will allow the appearance of global CCs, where it is possible to find examples of how outsourcing is becoming sophisticated and viable regardless of the specific function (Erik Granered, 2005, Gottfredson, Puryear, and Phillips 2005). Relocate may offer a variety of benefits such as reducing overall costs with infrastructures and human resources, increasing quality and innovation or the use of the latest technology. This process of relocation can be seen as the migration of part or all the value chain, to a local where the costs are lower (Linder, 2004, Robinson and Kalakota 2004). The authors state that the scope of the offshore to reduce costs and distribute the competencies and work depends on the telecommunications technology that makes possible the establishment of back-office operations in a variety of locations, thus taking advantage of low labour costs. Off shoring is emerging as a decisive strategy in the evolution of business models and the ability to progress (Gupta & Mukherji, 2007, Aron and Singh 2005). Boehe (2008) advocates the creation of competitive advantages by developing the use of the offshore market, combined with outsourcing location.

The use of relocation comes in part from the proliferation of Information and Communications Technologies (ICT) fuelling the trade in services and decreased costs of providing services across geographically distant locations (Papinniemi et al., 2005). ICT also allow the breakdown of the value chain through the use of outside suppliers, gaining advantage in reducing costs (van Marrewijk et al., 1996). The CCs are known for high turnover rates, and a current priority it is the training and retaining of the workforce to ensure consistency of processes in the long term (Batt, et al. 2005). The investment analysis of a relocation it is often based on the analysis of comparative indices, which support the construction of the Return On Investment (ROI) and verifying that there was an improved performance. The objectives of the relocation may be related to an increase in productivity, which could lead to a reduction of costs from the maintenance of these services with a less number of human resources, or increasing the flow of business without hiring new Human Resources. Cost reduction can

also result from lower costs with infrastructures (Jamil e Silva, 2005). Apart from the cost reduction there are concerns about the quality of service, given that quality is related to satisfaction and loyalty. Faulty services produce a more intense emotion and a more burdensome for the customer than a good service (Koskela 2002, Berry and Parasuramen 1992).

The previous referred aspects justify and demand the realization of a study that seeks to understand the whole process of internal relocation of CCs in Portugal.

METHOD

It is considered that exploratory studies are valuable when the research area is new, and it is necessary to perform an investigation in order to gain insight on a particular problem (Cooper, Schindler, 2003).

In a qualitative research the main concern is the interpretation of the phenomena. The case study is commonly used in research of phenomena delimited in time and activity and where it is possible to use diverse techniques for gathering empirical material (Godoy 1995a; Campomar 2005).

The Grounded Theory was developed by American sociologists and is defined as the derivation of qualitative and inductive study of a phenomenon that is developed and examined through the systematic collection and analysis of empirical material on the phenomenon. The empirical material collection, the theoretical analysis and the theory itself are interrelated. The main goal of formulating the theory it is the testing of the relationships between the variables (Strauss and Corbin 1990).

The process of the analysis of the empirical material is considered a procedure in which the data collected is divided, presented and discussed in order to establish relations between them. The objective of the analytical process is: build the theory, give the necessary scientific methodological rigor, assist the researcher to detect possible deviations, develop the foundation, density, sensitivity and the integration needed to generate a theory (Strauss; Corbin, 1990; Cassiani, Calirill and Pelá 1996).

In qualitative research the researcher begins from large points of interest, which are redefined as the study progresses (Godoy 1995b). This type of research is characterized by covering several areas of research, understanding the context of a situation, observing reality constructed within the organization to understand the phenomenon from the perspective of actors and not the researcher, understanding unique situations as part of a particular context, avoiding strong assumptions proposed in the beginning of research, and employing more than one data source (Merriam Brymam 1989 and 1998).

Using the case study, the researcher must be open to new discoveries, even when guided by a theoretical frame. The case study it is particularly appropriate in situations where it is impossible to separate the variables of the phenomenon in its context (Yin 1994, Godoy 1995b). The main purpose of using the case study is the clarification of decisions or a set of decisions at various levels, among others, why they were thought, how they were implemented, and what the results are (Yin, 1994). To collect the maximum benefit from this technique it is necessary that the observation and dynamics of the selected cases be accurate. This will ensure the soundness of data and the correct interpretation of them, which eventually will lead to a qualitative result (Nakano and Fleury, 1996).

To define the cases to be investigated in this study it was used the concept of theoretical sampling (Glaser and Strauss, 1967) that uses the basic principle of theoretical relevance, i.e. the contribution to the development of the subject to be searched.

The study is based on the analysis of the relations between the internals relocations of the CCs in Portugal and the strategies of organizations. The goal is to define the main reasons, benefits, costs, and results of this process. In this way the research focus on the following topics: the decision to relocate, how it emerges and what are the main objectives to achieve; the characteristics of the relocation and how companies have managed this process in order to maintain or improve their results; the relocation and customer service, what changed in customer service after the relocation.

The five participating organizations were selected based on the following criteria: companies operating in Portugal that made at least one relocation within the national territory. Empirical research fell on three sectors: telecommunications, utilities, and outsourcers.

Interviews and questionnaires to key executives of the organizations allowed the gathering of the empirical material.

Haguette (1997) defines the interview as a process of social interaction between two persons in which one of them (the interviewer) is mainly intended to obtain information from another person (the interviewee).

We choose to use a non structured interview, i.e., the realization of questions is not predetermined. The questions are placed in the course of the conversation in order to avoid influencing the interviewee. This type of interview is good to carry out exploratory studies, where the main aim is to understand a particular phenomenon from the perspective of the participants. This instrument is widespread in qualitative research methods such as phenomenology, grounded theory and ethnography (Munhall and Oiler, 1986).

The preparation of the interview is one of the most important steps of the research. It takes time and requires a careful preparation. Planning the interview should always take into account the objective which aims to be achieved. The interviewees should be recognized specialists within the research topic. The interview opportunity, which in other words is the availability of the interviewee or interest in participating in the interview, must be considered. The interview should be scheduled in advance, ensuring its successful completion. The confidentiality of the information, as well as the identity of the interviewee should be assured (if necessary).. The list of the questions must be prepared according with their relevance (Lakatos, 1996).

According to Fortin (1999) the script of unstructured interviews is a set of lines with topics not indicating the order or how to pose the questions. The interviews are taking place as an informal conversation. The questions emerge from the context and let the interviewee free to respond without selecting pre-determined answers. Another aspect to consider is the

formulation of the questions. The interviewer should have extra care to not develop absurd, arbitrary, ambiguous, displaced or biased questions. The investigator should conduct the interview transmitting a logical sense in the conversation. Direct questions may reduce the naturalness and sincerity. Instead, the interviewer may simply remind the interviewee the issue in analysis (Bourdieu, 1999; Gauthier, 1992).

It is essential develop a plan containing the main purpose of the interview as well as sub-themes, organized in a logical manner.. One of the cares for the interview is the scheduling of the meeting and the punctuality. The place should allow a good communication. It must be a place where the interviewee is not interrupted all the time (Fortin 1999, Burns and Grove 1993).

Questionnaires completed the interviews. In the designing of a questionnaire it is important to ensure the quality, for this is important to have several discussions and assessments. It is a continuous improvement process involving numerous changes and consumes a considerable amount of time (Abranson, 1984, Kelsey et al., 1986, White, 1985).

The elaboration of the questionnaire should then be governed by six steps: the definition of the relevant information to be collected, the formulation of the questions, the establishment of the sequence of questions and their format, the review of the draft questionnaire, the pre-testing, and the writing of the introduction and guidelines (Fortin, 1999).

The work began by defining the purpose of the questionnaire and its content, setting objectives and themes being addressed by determining the number of issues by theme. The questionnaire uses questions with fixed responses and also questions with free responses. Both were grouped logically and thematically. Issues of fixed response follow two formats: dichotomous questions and multiple choice questions.

In order to detect possible failures the questionnaire was submitted to a set of specialists in the area. A short introduction and associated guidelines completed the questionnaire. The developing of the questions and response options were based on literature review and on the unstructured interviews conducted previously.

ANALYSIS AND DISCUSSION OF THE RESULTS

Three major factors lead to the need of internal relocation of the CC, namely, the increase demand for the use of the telephonic channel, the need to ensure a process of disaster recovery, human resources exhaustion in the main urban centers (mainly Lisbon and Oporto), and cost reduction / increase revenue.

The reasons for relocation are then: the growth of business, costs reductions with infrastructures and human resources (by reducing the turnover rate), the need to ensure business continuity processes, the demand for better resources (the same pay package may be more competitive in smaller towns), business expansion through the request of a major customer (only in cases of outsourcers) and search for areas with little competition for human resources.

The most widely studies used are the demographic studies, studies to assess the responsiveness of the chosen city, the population studies, the existence of higher education schools, and studies to assess the receptivity for a potential recruitment. It is important that the target location has at least 50,000 habitants, with some unemployment, does not present a tendency for aging population, offers a young population even if it is seasonal (e.g. students from universities), and where the employment opportunities are reduced.

In order to decide the worth of pursuing relocation, the organizations conduct a cost / benefit analysis, in terms of return on investment (ROI). Risk analysis and some internal studies specifically social, demographic, and economic are also done.

In order to assess a financial investment, organizations use the indicators to measure the cost of turnover and absenteeism, perform comparative analysis of price activities between contact centers, do investment analysis, and finally the most common indicator is the ROI.

The relocation reduces the costs associated with the physical facilities and the turnover. Organizations receive local incentives from the city

hall and direct support of the locals' authorities. However, there is an increment of the financial costs of the organization from the investment financing, and an increase of the management costs that come from the need to create a team to carry out the local management.

Most organizations receive incentives of regional character, and these are offered / negotiated by regional authorities. For the study sample the existence of incentives is clearly an advantage, but it is not decisive for the relocation.

To guarantee the experience and knowledge of the relocated centers, some experienced members of the CC migrate also to the destination cities. This migration will be temporary only for three or four years, until the new CC may operate in a independent and self-sufficient mode.

The results show that all organizations are able to reduce costs on the level of infrastructures, with human resources, and with the exemption of some taxes / municipal taxes. They also improve the quality of service provided by the retention of staff and finally some organizations have an CC more efficient because of the productivity increase.

All organizations report decreases in turnover rates, and thus reduce costs of recruitment and training of human resources. Some of the organizations revealed that the reduction of these indicators was between 15% and 20%. It should be noted that in addition to reducing costs, the organization achieves a higher quality of the services.

For levels of service, it was found that the main indicators, the first contact resolution, number of complaints, breaks during the call, achieve the expected results, and even in some cases they are higher than the projected. Some organizations report that at start these indicators were slightly lower, result of inexperience or technical problems, but recovered quickly and now these CC are among the best sites.

Analysis of data collected in the context of existing work

The empirical material shows that the organizations in this study used outsourcing companies to implement their relocation (off course only the

organizations belonging to the outsourcers sector did not showed this factor). The advantage to outsource is referred by Gottfredson, Puryear and Phillips (2005), who argue that outsourcing was becoming so sophisticated that even the more complex functions could be performed by companies service providers.

Linder (2004) stated that the use of offshore services offers a wide range of benefits, including reducing the total cost of infrastructures and low labour costs (wages). The empirical material gathered support the idea of reducing the total cost of infrastructures, being those one of the objectives of the relocation. The reduction of labour costs does not come from the use of lower wages, since the organizations use the same wages between the CCs, however, the attractiveness of salary packages increases in locations where salaries are lower.

Analysis of the questionnaires revealed that some organizations have carried out a total relocation, while others performed a partial relocation. These types of relocation have already been mentioned by Robinson and Kalakota (2004), enunciating several examples to define the offshore as a migration of one part the or the whole operation to a local low cost.

Increased competitiveness presented by Porter (1990) and Reid (2003), is one of the reasons leading to the relocation fuelled through the intention of reducing costs and / or increased productivity / efficiency, organizations increase their competitiveness in different markets.

The incentives offered by local authorities have already been reported by Silva (2004), stating that governments of countries and cities offering tax exemptions and subsidies in order to attract CCs companies, because these companies create hundreds new jobs, especially for young workers (Silva, 2004).

During the assessment of data collected, it was stressed repeatedly the importance of reducing turnover rates and absenteeism of the labour force, thus reducing costs of recruitment and training, and increasing the quality of service provided. Batt et al. (2005) had already noted that organizations need to train and retain their workforce, so that you can ensure consistency of processes in the long term. The author also mentioned that the CCs are

known for high turnover rates which translate into the quality of service provided.

Jamil e Silva (2005) stressed the importance of preparing a comparative index to assess the calculation of ROI, aims at collecting information to assess whether an improvement project related to the relocation. Organizations present in the study reported the use of the ROI as a financial indicator relevant to the decision process.

Jamil e Silva (2005), reinforces the idea, already mentioned earlier, that an increase in productivity could lead to cost savings from the maintenance of these services with a less number of human resources or an increase in flows without having to hire more persons. Emphasize once again that the geographical area, i.e. the cost of equipment can also lead to costs reduction.

Throughout this study it is possible to verify the concern of organizations with customer satisfaction and quality service. The importance of customer satisfaction had been referenced by several authors such as Bateson and Hoffman (2001), Zeithaml and Bitner (2000), Lovelock and Yip (1996) and Ohmae (1988).

The materials allow the identification of criteria to be taken into account when choosing the location to invest. As important as the concern with the existence of the young population, costs of infrastructure lower, the local demographics and incentives of local governments, are also relevant the unemployment rate, the location of the competition, the new focus on employment, and the accessibility of the town.

Limitations of the study

The sample size and the characteristics of a qualitative study demand careful attention in the attempt of generalization of the findings found for all other CCs. For instance it is possible the existence of reasons and needs not mentioned by any of the organizations in this study. Another important issue relates to the fact that it was not possible to have all sectors that use the CCs in the study. Will be the reasons leading the outsourcers for the relocation the same for a financial organization? Will conduct the same studies? Will the use the same kinds of criteria? It appears that despite the

contribution of the information collected in this study, it is necessary some caution in applying it beyond the concerns mentioned above. Still all organizations in the study are large organizations, leading their markets and with CCs for more than eight years. The analysis of the financial burden carried by these companies may be quite different from the analysis carried out by smaller firms which may take greater risks and costs associated with the process. The small sample size, the absence of some sectors and the size and maturity of the organizations that were the subject of the study are the main aspects to consider in the validation of the results. It is considered that the data collected was a contribution to the study of internal relocation and highlighting important issues that can somehow being overlooked by some organizations, however, presents some limitations that should be taken into account.

CONCLUSIONS

Internal relocation occurs when a company located in one country decides to transfer all or part of their production capacity from its current headquarters to another location within the same country. In order to evaluate the relation between the relocation of CCs and the relationship between the organizations and their customers, the following research question was raised: what are the main reasons, procedures, studies, advantages, disadvantages, and best practices of an internal relocation of a CC?

The internal relocation of CCs can be a way to expand the business motivated by lower costs, such as infrastructure, wages, taxes, subsidies, among others. It may also be motivated by the need to ensure a disaster recovery process or by the running out of resources in large cities or even the reducing of costs and increasing the revenue. To evaluate the whole process of relocation, the organizations promote the following actions: demographics studies to assess the responsiveness of the chosen city, population studies, verify the existence of universities, and finally studies to assess the receptivity to a potential recruitment. They also do cost / benefit analysis, return on investment analysis, consider the associated risk and invest on some internal studies, specifically social, demographic and

economic. The organizations use indicators to assess the cost of turnover and absenteeism, they make comparative analysis of prices activities between contact centers, investment analysis and the most common indicator is the return on investment (ROI).

With the relocation, organizations reduce costs with physical facilities, training and receive local incentives.

The relocated services achieve the reference level values, thus, relocation ensures the quality of care and customer satisfaction. Actually, mostly of these indicators present a slightly improvement compared with the reference values.

Another result of the present work is the identification of some issues that can be addressed in future studies. It will be important the development of studies that aim primarily to discuss the perception of employees of CCs on their business / organizational sense after the relocation. The main objective is to compare the feelings of the employees of the new center with the previous ones and understand the main differences that underlie the disparities in the rates of turnover and absenteeism.

Another proposal is to carry out a study which examines the process of internal relocation of CCs, but in terms of who receives these centers, i.e. the places of destination. What are the main advantages, which incentives are offered, how the region reacts to people, what features are most relevant? The relevance of these questions is present at the micro level (analysis of regions), but also at the macro level (country analysis). It is interesting to realize how important these investments are for the regions but also for the country as a whole.

It will also be interesting to study the impacts of internal relocation in other countries.

Finally, it is pertinent to know the attractiveness of these investments internationally. Are the regions and in some cases the outsourcers capable to handle the investment of foreign companies? Can we be competitive in this sector? What advantages and disadvantages that foreign organizations find in our country?



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