Transforming the Help Desk & Customer Solutions Center for Life Out Here: A Case Study from Tractor Supply Company

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Session Description

At Tractor Supply Company, providing legendary service to stores and customers requires more than mere words. It’s been a distinguishing service philosophy since the company’s start more than seventy-five years ago. But with their storied history comes a great deal of transformation for the help desk and customer solutions center. In this session, learn how they’ve managed to keep their promise of top-notch service through recent years of significant store and omnichannel growth, increasing complexity in their business operation, and expanding expectations of the retail customer.

Speaker Background

Ryan Mayes is the director of the help desk and customer solutions center at Tractor Supply Company. In this role, he’s responsible for directing the contact center’s operations for stores, in-store customers, and online customer service and sales. Ryan received his MBA from Vanderbilt University.
Session 506: Transforming the Help Desk & Customer Solutions Center for Life Out Here: A Case Study from Tractor Supply Company

P. Ryan Mayes
About P. Ryan Mayes

- Director, Help Desk & Customer Solutions Center
- 11 years @ Tractor Supply Company in Brentwood, TN
- HDI Member, Music City Chapter
- 22 years experience in Fortune 50, 500 & private organizations
  - Retail, services, management consulting, & manufacturing
  - Predominantly customer engagement & facing
- MBA & ME, Vanderbilt University & licensed P.E.

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It doesn’t always have to be about work...

Sometimes (Always!) you need to go stand up paddle boarding in Nashville, TN or Lake Jocassee, SC!
Purpose: Why are we here?

Transformation - implies a complete or major change
... and most people don’t like change!

My case in point:

Nearly 70% of all change management projects FAIL
and that figure has remained consistent for 40 years.....

Source: Harvard Business Review, April 2013

Actually, this is why we are REALLY here!

- I want YOU part of the 30%!
- Every leadership opportunity
- Armed with a guide for success
- Comfortable and confident
- Regardless of situation or environment

Today,

I will introduce the 4-step approach
that you can use every time to successfully lead transformational projects.....
About Tractor Supply Company

- Founded in 1938
- 1,600+ stores in 49 states (600 when I joined in 2006)
- ~$7B in annual sales
- 24,000 team members
- Fortune 500
- Publicly held - Nasdaq exchange (TSCO)

Tractor Supply Company is the leading rural lifestyle retailer, primarily located in rural communities, serving the self-reliant and DIY customer. We are the dependable supplier to the Out Here customer who cares for their home, land, pets & animals.

Our Challenge:
Provide legendary service to a growing & evolving store & customer landscape

Growth: 2,500 domestic stores
Expansion: Westward (new markets) & more dense (existing markets)
Omnichannel: Uniting the online & in-store customer experience
Programs: Loyalty program, Buy online/pick up in store, store technology
Cust Experience: Shop us anytime, anywhere, anyway
Mission & Values – More than just our Culture

Everything we discuss today relates to:

- Our Mission & Values
- Our team and our team members
- Our store (customer) and our customer

Service Philosophy
Help Desk & Customer Solutions Center

We are a virtual extension of the store experience
Our stores are our customers
We serve our customers as our stores serve them

Transforming the operation to meet business demands

2012
- Help Desk
- In Store customer service
- Online customer service & sales

Q3: Different dept brought online team in-house
1st version of PCI
1st time selling

2013
- Help Desk
- Customer Solutions Center

Q2: 2 customer service teams combined
Q3: 2 service phone numbers combined

2014
- Help Desk
- Customer Solutions Center

Unified department
Rebranded identity
2nd version of PCI
Technology upgrade
Similar reporting suite
In-room monitoring
1 P&L
Transformative opportunity = leadership opportunity

Beyond the operation itself

As a leader
to a new team
undergoing significant transformation
You have the opportunity to exhibit leadership qualities

- Leading leaders
- Making the tough call
- Building new alliances
- Managing up
- Politically savvy
- Demonstrating empathy
- Situational awareness
- Celebrating the victory
- Sharing the vision
- Ambassador for change
- Factual & concise
- THE source of information
- Communicating & messaging
- Inspiring achievement
- Standing alone

Key Takeaway:

“The larger the project, the larger the stage, the greater the obstacle – the greater the opportunity to lead others to achieve something worthwhile – as a team – that leaves a lasting legacy.”

Help Desk & Customer Solutions Center
Transforming People, Process, & Technology

- Culture
- Identity/Purpose
- Roles & responsibilities
- Operations
- Process
- Work approach
- Systems
- Integration
- Data & information
The Challenge – Transforming people

- **Culture**
  - Merge a new & different online sales culture with an in-store service & help desk support model
  - Balance PCI with team member needs & concerns
- **Identity/Purpose**
  - Call center vs. contact center service philosophy
  - Agents, employees, or team members
  - Entry level vs. professionals
  - Pay rate vs. organization value
- **Roles**
  - Supervisor and team lead org structures
  - Job titles, descriptions, & rates
  - Job roles & expectations
  - Generalists and specialists

The Challenge – Transforming process

- **Operations**
  - Different operating hours & shift schedules
  - The online customer needs us on holidays too
  - 2 customer service teams with 2 different Phone #s
- **Process**
  - Disposition in phone system or ticket system, but not both
  - Ticket classification & clarity – contact drivers
- **Work approach**
  - SOPs and the ‘1-way’ approach
  - Individual owned vs. team owned
  - Islands of information, islands of knowledge
  - Transition to a service level philosophy
The Challenge – Transforming technology

- **Systems**
  - Using the corporate phone system w/FIFO
  - Call **routing** & prioritization
  - **Upgrade** cadence, capacity planning, & stress testing

- **Integration**
  - Phone, ticket, and systems were separate
  - Agent’s entire sign-on was **desk specific**
  - Multiple desktop software versions

- **Data & information**
  - **Data** is one thing, information is another
  - Multiple data repositories
  - **Differing viewpoints** on the same calculation
  - **Varying measures** of success
  - **Reactive** vs. in real time

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**The 4-Step Approach**
*A Practical 4-Step Organizational Change Management Plan*

**Step 1** **Assess**
Your current situation may be positive – or it may not!

**Step 2** **Measure**
Make no changes until you understand the current situation (Step 1) and how to measure it.

**Step 3** **Determine Sequence**
Determine the proper sequence of change events based on dependencies and resources.

**Step 4** **Establish Timeline**
Understand how much time you have to implement positive change and determine the appropriate timeline with this in mind.
The 4-Step Approach
A Practical 4-Step Organizational Change Management Plan

Step 1  Assess
Your current situation may be positive – or it may not!

- Identify the major players
  - Both supporters & detractors
  - How political is your environment?
  - What is the actual appetite for real change?
- Account for support at all levels, not just yours
  - Do you have your boss’ support? His or her boss?
  - What about senior leadership or the Board?
  - Other departments or external vendors?

The Payoff for Step 1
- The more you understand the environment and the players, the more you can acquire real buy-in and ownership in implementing the change.
- You transform the situation from ‘your project’ to ‘our project’ and ‘team project’!

Step 2  Measure
Identify metrics & measures of success – before beginning

- Metrics
  - The what, how, and when to measure
  - Value to you and value to your audience
  - Thoroughness accurately defines the current state
- Measures of success
  - How do you know if the changes work?
  - How do you know if you’re winning?
  - Quick reaction to make course corrections, if necessary

The Payoff for Step 2
- Clearly defining and understanding the changes in these metrics will help you clearly communicate status, progress, and success.
The 4-Step Approach
A Practical 4-Step Organizational Change Management Plan

Step 3  Determine Sequence
Determine the proper sequence of change events based on dependencies and resources.

- Identify dependencies
  - Is one task (or project) dependent on another?
  - Focus on dependent and foundational items first
- Approach
  - One task or many tasks at a time?
  - Can you group like items together?
  - Don’t lose site of showing progress in many areas at once
- Resources
  - People and capital are expensive – and always will be
  - Your timeline isn’t always everyone else’s
  - Prepare to re-sequence & reprioritize based on resources

The Payoff for Step 3
- Considering dependencies, approach, and resources in every decision allows you to always progress forward in an effective manner.
- Continuously evaluate Step 3. Change environments require continual situational awareness. You may need to make adjustments throughout.

The 4-Step Approach
A Practical 4-Step Organizational Change Management Plan

Step 4  Establish Timeline
Understanding the time you have to implement positive change directly affects your timeline of change events in Steps 1-3.

- The real timeline
  - You never have as much time as you think or want!
  - Work with your partners in Step 1 seeking their input & support
  - Go for quick wins
  - Never underestimate the value of momentum
  - Quick wins show progress & build confidence
- Communicate
  - Sometimes leadership thinks no communication = no progress
  - Leaders are proactive communicators
  - True status = the good with the bad = no surprises

The Payoff for Step 4
- Leaders control what they can and mitigate the risks of what they cannot.
- Leaders achieve the most value by effectively considering the choices of change events necessary to balance the 1) time necessary and 2) time imposed.
The 4-Step Approach
A Practical 4-Step Organizational Change Management Plan

Effective leadership is simultaneously focusing on the 4

“The key to succeeding in both organizational and even individual or small group change situations is to eventually reach a level of proficiency that will allow you to focus on all four steps simultaneously. That is the ultimate goal and the key to true success!”

- You can lead teams and others comfortably, confidently, and successfully.

What were the transformative results?

People  Process  Technology
The Results – Transforming people

• Culture
  • Help Desk + Customer Solutions Center = 1 Team
  • We serve our customer regardless of sale or service
  • PCI policy secures customer data & ensures team balance

• Identity/Purpose
  • Elevating the image: We are professionals and invaluable to the organization and to our customer
  • Every customer = every contact = every day

• Roles
  • 1 org chart that scales up, with succession planning
  • Job roles & expectations become consistent
  • Training & development ensures consistency using H.R. tools & a department training program

The Results – Transforming process

• Operations
  • Uniform operating hours & shifts
  • 1 customer phone # - single customer entry point

• Process
  • ‘1-way’ to disposition all call & contact
  • Revised ticket structure from the store & customer perspective

• Work approach
  • SOPs and the ‘1-way’ approach foundation
  • Engaged team feedback, insight, & buy-in
  • Developed team newsletter and communication wall for centralized communication
  • Instituted team led committees to increase engagement
The Results – Transforming technology

- **Systems**
  - Cisco Contact Center Express w/upgrade cadence
  - Call prioritization & skill-based routing
  - IVR with self-attendant features (30% deflection), industry best practices, & TSC branded
  - Established QA & UAT environments
  - Established capacity & stress testing protocol

- **Integration**
  - Application server rather than desktop software
  - Established technical foundation for work-from-home

- **Data & Information**
  - Cisco & Business Objects data repositories
  - Uniform report suite & calculations
  - In-room monitoring and alert reporting

Leadership lessons learned along the way...
This is what 30% looks like! You **CAN** do this!

Thank you for attending this session.

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