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## Case

# Three Mountain Communications: Considerations for Workplace Task Allocation

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Brian Gilbert made his way to the old building that housed the Three Mountain Communication's (TMC) call center at Pocatello in Idaho. Earlier in the morning, he had made the trip from TMC's regional center at Boise. During the four-hour-long drive he enjoyed the scenic route among the mountains and had a chance to think about the work that waited for him at Pocatello.

## TMC

TMC is a regional firm with an annual revenue of \$18 million. The firm operates 17 call centers in the north-west region of the United States. It focuses on the vehicle insurance business and provides call center services to process insurance claims. These insurance claims vary from a fender bender that would be repaired at local shops to totaled vehicles that need replacements. TMC was started through a federal government program to support entrepreneurship efforts in the Native American community. Axtell Ipsusnute was pursuing an undergraduate degree in business at the University of Idaho when he came across the details of the program. He was a first-generation student from his family and felt the pull from home to return back after finishing his degree. However, he also worried about potential opportunities in Salmon River mountains. The federal government program offered resources to Native Americans to start businesses that would provide employment to local youths. He started the first call center in Challis and found an enthusiastic partner in a national insurance

company. Over a period of time, he grew the business establishing new centers all over Idaho and Oregon. He continued to derive a satisfaction from providing employment opportunities to Native Americans and others in less-developed areas in these two states. Most of his centers were small, with 4–10 employees, usually creating cohesive groups. His employees valued the hard-to-come-by opportunity for steady employment in their geographical regions. This recognition often translated into superior performance of call centers, as measured through customer satisfaction surveys. As the business grew, he hired supervisory managers who would help with process setups and improvements at individual centers. Brian was one of his most talented managers.

In a recent visit to the Pocatello center, Axtell had conversations with almost all employees. All of them said that they thought they were paid well and that TMC was a great professional opportunity for them. However, he felt that individual employees did not talk enough about their experience as a group. Erica, the team lead at the center, noted in later conversations that there was indeed some friction among employees recently, especially around how the calls were allocated/claimed by individual employees. It was she who suggested that a process manager visit them to come up with a protocol to allocate calls to individual employees.

## Operating Model at Pocatello Call Center

The Pocatello center, consisting of four fixed wage employees who work eight hours daily, exclusively

**Table 1.** Average Call Duration (in Minutes) by Each Employee for Each Type of Call

Employee	Call type													
	I-R	I-M	I-N	C-R	C-P	C-I	N-Q	N-Pcr	MI	MC	MN	AD1	AD2	AD3
Erica	38	7	18	93	143	17	60	76	36	68	25	46	42	55
Robin	53	10	40	89	122	19	64	70	76	86	23	58	57	30
Washakie	25	15	22	80	90	20	68	60	35	67	16	47	30	40
Dan	51	14	42	120	175	17	59	72	12	74	27	45	30	53

deals in callbacks. When a customer calls their insurance provider regarding a claim, the call is routed to TMC. The customer could choose to either wait on the line or leave a callback number for a return call the next day. If they choose to remain on the line, the call is routed to one of TMC’s larger call centers. If the customer chooses the “call back” option, the call information is routed to the Pocatello center’s computer system. The system records the call back number, policy number if available, and a verbal description of the issue provided by the customer. An automated system sifts through the audio and then classifies the call into one of fourteen categories.

There was no fixed system in place for allocating the calls. Erica had been with the center from the beginning, and she believed in giving a flexibility to employees in selecting the calls they would make every day. Typically, each employee was required to make at least five calls every day during their eight-hour shift, unless the system had fewer calls in the system for the day.

### Brain’s One-on-One Interviews

**Erica:** I want to be sympathetic to employees. At the same time, I need to run my center efficiently. The way I try to strike this balance is by giving employees a flexibility to come to office and self-sign for calls. I come in later during the day and pick up calls that others have chosen to not work on. I absorb the slack. Everyone needs to work on five calls at least every day. Typically, the system transfers 20–40 calls to our board overnight so five calls for each of four of us is usually the minimum.

**Robin:** I am not happy about this situation at all. Some calls are just more difficult, especially for me. By the time I drop my kids off to daycare and come to office, it feels like all easy calls are already signed off. I get stuck with calls that take anywhere between half an hour to an hour. And when the customer disconnects in the middle of a call, I do not get my credit for the call. Why can’t I get the shorter calls? I know I am slow in my calls. I just like to listen to the customers and walk them through all insurance details and options. Often, I would also ask them how they are coping with the loss of their vehicle. We in the insurance industry get a bad rep, and I try to make sure that our customers see a

nicer side of us. But I feel like I often get penalized for this attitude, which all of us should have!

**Washakie:** I feel like working at Three Mountain is a mixed bag. I appreciate the opportunity to work. There are not many employment opportunities around here. Three Mountain also provides flexible scheduling. I usually come early, around 6:30–7:00. I look at the list of the calls to be made for the day, choose my five calls that I need to make to meet my daily quota, and get to work. Later during the workday, Erica comes by to tell me if I need to pitch in more. In most cases, I am finished with my work by 3:00. I reach back home in time and often spend the time at the reservation office. There is not much scope for professional growth, but I am staying close to my home where I grew up.

**Dan:** Not a happy camper! Almost every day, Erica comes by and asks me to help her out by making additional calls. I know she means well, but I do not like that she picks me every day for this additional work. She could ask others to pitch in, but mostly she does not. I like this work, but don’t want to feel that I am being taken advantage of.

### Postinterview Reflection

Brian felt that these interviews gave him a sense of the schedule and activities of the employees at the call center. However, he also knew that all calls that come in are different, and all workers are different as well. He requested the central human resources department to pull out data for all calls that each employee had

**Table 2.** Call Type Code and Description

Code	Description
I-R	Insurance replace-vehicle
I-M	Insurance money payment
I-N	No action
C-R	Coordination repair
C-P	Coordination purchase
C-I	Coordination insurance
N-Q	New customer quote
N-Pcr	New customer purchase
MI	Miscellaneous insurance
MC	Miscellaneous coordination
MN	Miscellaneous new customer
AD	Administrative

**Table 3.** Number of Each Type of Call Needed to Be Handled

	Call type													
	I-R	I-M	I-N	C-R	C-P	C-I	N-Q	N-Pcr	MI	MC	MN	AD1	AD2	AD3
Queue size	3	2	2	3	2	5	2	3	2	2	2	2	4	2

handled in the last six months. From these data, he figured out the average duration required by each employee to handle each type of call (Table 1). Raw data for these call durations are available in a spreadsheet format. Table 2 shows the call type codes and their corresponding description. To be fair to Erica, Brian figured he should try to assign calls to each

employee for a few days. This will give him an opportunity to step into Erica's shoes. It might also provide insights about why call allocation is a source of dissatisfaction at the call center.

On an early Monday morning, he pulled out the data for the calls of each type that were to be handled by the center that day (Table 3 shows these data).