LEXIS NEXIS FUELS ITS SEARCH ENGINE

Help-line staffers at the subscription-research service are supposed to educate customers who often are experienced researchers themselves. So LexisNexis has to make its people "better and faster than the best."

BY JACK GORDON

Online research service LexisNexis maintains a 24-hour customer-service phone line for it subscribers. Some callers have technical or operational problems that may be as simple as having forgotten their passwords. Other questions are more complex. Indeed, since LexisNexis provides access to more than 5 billion searchable documents from legal, news, and business sources, and since many of its subscribers are lawyers, financial analysts, or reporters attempting to conduct rather arcane research, some of the questions can be *very* complex.

This presents certain…challenges… for the representatives who answer the phone. On the legal side, for instance, "we're essentially an immense law library, so our reps have to function as highly efficient legal librarians," says Thor Larson, acting manager of training and development for customer support

LEXISNEXIS TRAINEES PRACTICE RESPONDING TO REALISTIC CUSTOMER REQUESTS OR SCENARIOS USING THE ACTUAL DATABASES AND OTHER TOOLS THEY WILL EMPLOY ON THE JOB.

at the company's Miamisburg, OH, facility.

Almost all of the phone reps who handle legal research questions for LexisNexis have law degrees, Larson says. But a J.D. amounts to mere background preparation for handling a series of calls that might go like this: First, a law student needs help to research a paper. Next, a judge's clerk wants to verify some information in a brief. Then, an attorney working on a case involving a ship collision on the high seas needs guidance to search for applicable international laws and treaties. Then, a lawyer who only heard about a court case on the news wants to find a specific document. Then, another attorney needs to know how to set up an automated clipping service to track developments in, say, Massachusetts real estate law.

All of those calls and more could confront a service rep in less than an hour on the phone. But wait, that's not the hard part. Since legal research is a fundamental skill taught in law schools, most of the callers are, themselves, experienced researchers, "and we need our reps to be better and faster than the best of the callers," Larson says.

That's still not the hard part. Here is the hard part: The help line is intended not only to answer subscribers' questions or solve their problems but to teach them how to solve their own problems in the future. In other words, the phone reps have an explicit training agenda.

"We're aiming at customer self-sufficiency as a goal," Larson says. The quality-assurance process used to rate the reps' performance includes "customer education" as one important factor. "If a customer calls looking for a case, we don't want the rep to put the person on hold, find the case, give it to them, and say goodbye," he says. Unless callers indicate they are in a blazing hurry ("a judge is breathing down my neck"), LexisNexis instead wants its reps to say, "Here's how I'm doing this," and walk the customer through the process of getting the answer.

Expectations for the legal group apply as well to reps who handle calls on the news/finance side and to those who help callers with technical problems. In 2005, LexisNexis calculated that its customer service group—roughly 250 phone reps—fielded more than 1 million calls, 36 percent of which were research related and led to "training moments" for customers. Those calls averaged 10 minutes each, meaning that in the course of a year, the service reps delivered at least 60,000 hours of customer training.

How in the world does LexisNexis prepare them to do that?

I NEED IT NOW

Larson points out that the call line is designed to serve a specific kind of customer-education need: Reps teach individual subscribers how to solve particular kinds of research problems at the moment when the subscriber actually faces such a problem.

Other forms of customer education are available for different needs. Online tutorials cover general subjects such as how LexisNexis libraries and sources are organized, how to search them, what a "result set" might look like, and so on. Online help screens answer frequently asked questions. Subscribers can sign up for hour-long training sessions by phone with a customer-education group that operates separately from the help-line staff. Or customers can arrange through LexisNexis sales reps for trainers to come to their offices and conduct group sessions. Help-line callers with questions that go beyond the research problem at hand may be referred to one of those options.

To train the help-line staff, Larson explains, LexisNexis relies mainly on veteran reps and a constant stream of information tracked from the actual calls that come into the service line. Depending on their backgrounds, customer service reps are assigned either to the technical/operations group, the news/finance group (for searches of public records, corporate financial information, media coverage of various subjects, etc.), or the legal group. Within those broad specialties, reps are organized into "centers of expertise" (COEs). On the news/finance side, where several reps have advanced degrees in subjects such as finance and business, one example is a COE devoted to public records. COEs on the legal side specialize in subjects such as legislation, federal taxation, or case law.

The job of, say, the federal taxation COE, "is to become

Can I Help You—Online?

Thought teaching customer service reps phone manners was a challenge? Try training them on Web-based customer service applications, a burgeoning trend that places a high priority on reading and writing skills.

"It's interesting how much one of the newest generations—which I call the Xbox generation—knows about and expects of the technology being used in Web-based customer service. Often they seem to know it better than the agents themselves do," points out Oscar Alban, principal global market consultant with Witness Actionable Solutions, a division of Verint Systems. "They have high expectations. My teenage son goes to the Web first for customer service, whereas a baby boomer would more likely go to the phone."

While Web-based customer service is just emerging, it soon may be a major force. In fact, call center volumes in North America are stagnant for the first time in nine years, according to a survey by Dimension Data, while alternative channels, such as e-mail, chat, and, for the first time, video, are on the rise. "In terms of training, the difference is that you don't have the voice channel, so different skill sets are needed," Alban says. "With agents now communicating with customers in real time via text messaging, they need excellent reading and writing skills. The challenge becomes companies being represented in written form, which leaves them open to risk. There's also the issue of systems training. Verint Witness Actionable Solutions, for example, provides systems to monitor the quality of Web-based customer service, allowing managers to see what customers are seeing first-hand."

Getting more futuristic—and coming soon—Alban says is technology that will enable companies to match agents' personalities with those of their customers. When hiring agents for Web-based customer service, companies are using e-learning tools to identify new skills requirements, such as can the person multitask? Is he or she computer savvy? "It's not unusual for Web-based agents to have four or five applications (and up to 21) up on their screen at one time," Alban notes. "I used to say, 'It's not rocket science,' but that's not true anymore."

When it comes to training, there's a big difference between e-learning in a customer service organization and e-learning in an enterprise environment, Alban says. "Customer service centers are at the whim of call volume. You can't put off training, but you can't pull agents away from customers. You have to predict when the surges will occur, so agents can take the training during the off times. It's not feasible to take agents out of their seats and put them in a room. You can't just paintbrush stroke a course and hope people get it. It's not just about attaining efficiency, it's about attaining effectiveness."

A fast-growing segment of the customer service population is now at-home agents. There are already 130,000 in the U.S., Alban says. "With this group, you're looking for people who can self-manage and take to distance learning. Here, we're attracting seasoned workers who have high business skills."

If you're looking to implement a training system for Web-based customer service, Alban offers a few tips:

- Make sure the training system is industry compliant.
- Make sure the system fits into the standard process of doing things. For example, "in our system, if an agent is ranked below a certain competency threshold, an e-learning course automatically is deployed to that agent's desktop," Alban says.
- Have a good back-end tracking system. This includes documenting who took the course, if they passed, and tying it to a performance measure. In other words, did the agent's skills improve? Did the quality of the interaction go up? Once training was complete, were the new skills retained and put into practice?

—Lorri Freifeld

LEXISNEXIS' HELP LINE AIMS TO TEACH CUSTOMERS HOW TO SOLVE THEIR OWN PROBLEMS.

masters of tax research using our system," Larson says. They then create support databases and training to ensure that every member of the legal staff, regardless of the particular COE to which he or she is assigned, "is able to handle all likely questions about tax research."

Those support databases are the essential job aids reps use to help customers answer research questions. They contain instructions, anticipated questions, and what Larson calls "the accumulated wisdom of the COE." Training for LexisNexis service reps is largely a matter of learning how to use the support databases and other tools to find answers quickly—and via search methods that can be explained to the customer.

Larson says the job of his own four-person unit of training specialists boils down to two tasks. First, help the COEs organize their databases as usefully as possible. Then teach selected COE members how to act as effective trainers—because those COE members are the ones who teach other reps how to use the tools they have created.

Feeding into those database/job aids, refreshing and refining them, is a constant stream of information from the COEs and from an automated call-logging system that tracks the volume and nature of customer questions about particular subjects. (A separate system called WebStar tracks customer reports of errors or omissions in the LexisNexis libraries themselves—court cases that have been decided but are not in the system, for example.)

SCENARIO STRATEGIES

Whether the training is for new hires or for veteran reps in frequent refresher sessions, "our aim is to build skills and resourcefulness, not so much to impart knowledge," Larson says. Taking the legal side, for example, it would be pointless to try to cram the reps' memories with details about torts, insurance law, constitutional law, tax codes, and so on. The potential research topics they will have to handle are far too vast. "Your memory can't retain the details or even how to find a particular detail," Larson says. "What we can teach is how to use tools and resources to resolve a lot of realistic situations."

Most of the instruction, therefore, puts trainees in front of computers to practice responding to realistic customer requests or scenarios, using the actual databases and other tools (such as the logging system) they will employ on the job. The trainer, usually a veteran rep, spends most of the classroom time acting as a roving coach while the students work. Even in initial training for new hires, the scenario model is in play about half the time in the early stages, and more than that later, Larson says.

New hires—109 of them last year—receive seven to 10 weeks of full-time classroom training before they go to work for real. The orientation period is longest for those on the legal side. It isn't until the third or fourth week that the class "hits an actual legal topic, such as case law," Larson says. Up to that point, the focus is entirely upon subjects such as how to use the support database and the logging system, how to search the database to find advice from a COE, and so on.

Refinements to the databases—different routes to a solution suggested by a COE, for instance—may be tested in training classes before taking effect. "If changes to our resources don't cut it in a training experience, they won't work for our reps on the phone," Larson says.

Both in initial training and in the ongoing classes reps attend as various COEs add new information and tactics to their databases, the instructional method centers on realistic exercises that simulate the actual job. In one way or another, the exercises always involve finding an answer. "But while the answer needs to be right," Larson says, "the focus is on what strategies they used to get the right answer." Which worked best? And more particularly, "Which gives us the best opportunity to help the customer become self-sufficient?"

Self-sufficiency also is an outcome for the reps themselves, as realistic practice gives them the confidence and skills to handle almost any situation a caller may throw at them. Finding answers is what the job is all about, and training them to find answers rather than to memorize information "frees us from teaching all the details," Larson says.

Why this enthusiasm for teaching processes rather than details? The advantage is best illustrated, Larson says, by a phrase commonly heard in most workplaces but never uttered by LexisNexis service reps: "Nobody ever says, 'I never got trained in that.' In our case, it would be silly."