



CHAPTER 15

CALL CENTRES IN DISTANCE EDUCATION

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INTRODUCTION

In the past decade, call centres and contact centres have evolved to become the front line for customer interaction in many types of organizations. As such, they have a critical importance in the implementation of organizational strategy (Evanson, Harker, & Frei, 1998). Call centres have applications in many industries which offer customer service, as they can provide customers with a single access point to diverse services; they can also be critical in the management of an organization's relationship with its customers. While many organizations use call centres to solicit clients or customers for new sales or donations, they are also used to accomplish surveys of customer satisfaction or public opinion and provide services to customers. Despite their growing ubiquity, call centres have been subject to severe criticism as poor places to work (Taylor & Bain, 1999). Nonetheless, not all call centres are subject to the common criticisms of being highly Tayloristic and unrewarding places to work (Holman, 2002).

In education, call centres can be useful to an educational institution in many ways, ranging from simple provision of information to prospective students, to fundraising, collection of survey data, and even provision of instructional services (Hitch & MacBrayne, 2003). In distance education in particular, the call centre concept can be an effective communication tool, enabling the institution to provide and improve service to students in many areas, including instruction (Adria & Woudstra, 2001; Kondra & Michalczuk, 2007). When coupled with customer relationship management (CRM) software, a call centre can become a powerful tool in the development and maintenance of the student-university relationship, and provide a critical link to the university for an often isolated learner (Kondra & Michalczuk, 2007). CRM software can also provide for quality control in student interaction and even help in instructional design. At Athabasca University, call centres are used in a number of contexts and show the potential for expansion and consolidation, to take advantage of economies of scale.

ORGANIZATIONAL STRATEGY AND CALL CENTRES

Strategy and strategic decision-making have long been areas of active academic and practitioner inquiry. Chandler (1962) studied the development of American corporations in the early twentieth century, and postulated that corporate structure was designed to implement strategy; in other words, structure followed strategy. Much recent work (Eisenhardt, 1999; Kim & Mauborgne, 1999; Markides, 1999; Pascale, 1999) suggests that strategy is a dynamic that emerges from the competitive environment, evaluates that environment in an ongoing manner, and flexibly adjusts the corporate course when necessary. Organizations compete on the edge, adjusting their deployment of employees and other resources as necessary strategic changes are made (Hamel & Prahalad, 1994).

Over the past 20 to 25 years, experience has shown that information technology is an increasingly important potential contributor to an organization's productivity, and that organizations experience maximum value when information technology investments are strategically driven. Davenport and Short (1990) studied the relationship between information technology and business process redesign, and postulate an enabling link between, on the one hand, the development of strategic vision and process objectives, and on the other, successful, information-technology-driven process redesign.

Call centres provide an example of the application of these concepts. Call centre design has been enabled by the use of telecommunications technology and its ongoing integration with information technology. Call centre concepts are becoming integral to the redesign of business processes (particularly informational processes as distinguished from those focused on physical objects), and where call centre implementations are strategically driven and aligned, their value to the organization increases.

It is important that the objectives established for a call centre support and enhance the organization's strategic direction. For example, a call centre focused on routing telephone calls to the appropriate staff member or department has a relatively narrow task; it will be suited to an organization that needs to give short, concise answers to a high call volume. An inbound telemarketing call centre focused on sales will allow longer calls, focusing on minimizing waiting times and maximizing sales impact. If the organization as a whole is strategically focused on the creation of customer loyalty, however, the call centre would be a primary means to achieve that goal, and both of the examples above would fall short in contributing to this corporate strategy (Holt, 2000).

Many call centre managers are looking for ways to build cost-effective, competitive operations using industry benchmark information:

We've become obsessed in this industry with mass comparison. We survey and benchmark and publish averages, quartiles and percentages. These numbers get proclaimed as 'industry standards' that your call centre should aspire to match. (Cleveland & Hopton, 2002)

As these authors go on to note, however, the surveys reveal that, overall, customers were not happy with the service. Call centres are in a chronic state of balancing productivity and quality (Kantsperger & Kunz, 2005), and balancing this inherent tension between call centre standardization and customization will always be a concern (Frenkel, Tam, Korczynski, & Shire, 1998).

Given the diversity of mission and function in call centres, it is likely that what fits one will not fit all. It is much better to examine what the organization is trying to achieve, and to build processes and systems that help to achieve these goals in effective and efficient ways. Call centres can be a sound strategic asset for an organization, because they can strengthen customer relationships, and enable the organization to

learn more about customers, to serve them better. Adria and Chowdhury (2002) make a strong case for using call centres to improve an organization's ability to serve its customers. They argue for the empowerment of call centre managers and employees to enhance customer service, and they note that the main responsibility for workers in a call centre operation is to maintain and enhance the reputation of the organization. That is, the organization's carefully developed customer service culture is at risk during each customer interaction.

As universities deal with a more competitive environment, they are adopting a student-as-customer strategy (Driscoll & Wicks, 1998). Integrating a call centre into an overall strategic plan can separate one distance education provider from another. Given that the competition for students in the distance education environment is increasing, careful strategic positioning of the distance education provider is essential.

One of the strategic decisions that must be made by an organization is whether or not to outsource a call centre. A call centre can outsource as much or as little of the technology and services as they choose. By outsourcing, companies aim to benefit quickly from the fast and efficient resources from an outside source. The complexity of managing outsourcing relationships and gaining an accurate picture of results, however, is proving to be very difficult and costly. Outsourcing call centres in the education arena could prove to be even more difficult as customer service representatives (CSRs) are an important part of the overall teaching team and relationship management, thereby increasing the risk associated with outsourcing.

CALL CENTRES IN ORGANIZATIONS

Traditionally, call centres have been implemented in businesses to improve cost effectiveness and the delivery of customer services, as well as to generate additional revenue. While their popularity has been growing, they have a bad reputation and have been described as a "modern form of 'Taylorism'" (Zapf, Isic, Bechtoldt, & Blau, 2003, p. 311), and even as "satanic mills" (Kinnie, Hutchinson, & Purcell, 2000, p. 967). Criticisms of call centres include Batt & Moynihan (2002):

- Low skilled work
- Poor working conditions
- Fast, machine pacing of work
- Routine, standardized, and boring tasks

- High stress
- Short, fast job cycles
- Poor job security
- Low pay, possibly piece rate
- Extreme employee monitoring

These criticisms are associated with the mass-production, high-volume, low-value-added examples particularly associated with surveying and telemarketing, which are the most visible examples of call centres. Despite these criticisms, alternative models do exist that ameliorate these problems (Batt & Moynihan, 2002). Call centres can help streamline and enrich customer service, and provide customers and staff with a knowledge base through technology that complements labour, rather than replaces it, and does not create a frenetic pace of work. Some call centres have been designed in a manner that requires highly skilled workers with associated job security, high pay, task variety, and worker satisfaction (Batt, 2002). It is also possible to design enriched jobs by mixing administrative and other work to improve task variety, and by introducing high-commitment human resource management practices to increase overall job and user satisfaction (Houlihan, 2002).

The professional service and mass customization models are two high value-added call centre models that attempt to overcome many of the standard criticisms of call centres (Batt & Moynihan, 2002). In the professional service model, technology does not replace labour but complements it; employees need to be educated and highly skilled. Collaborative decision making with elements of discretion in decision making and teamwork are essential. Individuals develop substantial firm-specific social capital that hinges on trust among professionals. The mass customization model is a hybrid between the professional service model and the mass production model. This hybrid model attempts to keep costs down while providing a quality, customized service. Automation and process reengineering are essential to help keep costs down while trying to provide a high quality interactive experience. The hybrid model also requires CSRs to exercise a high degree of discretion and skill, as they are usually expected to deal with relatively complex user interactions.

In both of these high-involvement models, technology is intended to complement rather than replace labour; work is highly skilled, discretion is involved, and collaborative work is essential. Collaborative structures generally provide better call centre service (Batt & Moynihan, 2002), and both models are consistent with high-commitment human resource management practices that should improve overall job and user satisfaction.

Call centres have particular significance in three areas: customer service and retention, direct marketing, and information sources for management and customer feedback (Friedman, 2001).

- *Customer/student service and retention:* In business operations, call centres have become the primary contact point with customers, and serve as the means by which the organization creates a long-term relationship with individual customers and maintains customer satisfaction. Customer satisfaction will generally lead to retention and to word-of-mouth recommendations. In distance education, call centres can help create the same type of relationship. In the context of a university's service standards for processing applications, marking assignments, or answering calls and messages, call centre staff are the consistent point of contact with the student, and can even become their advocates.
- *Direct marketing:* The support provided by a call centre is increasingly seen as a service that customers expect to find integrated with product offerings, and available by phone and on the Internet. This contact with the customer (who, in the case of online or distance education, is a student) may result in opportunities to help the student choose additional products (programs or courses) and services (e.g., advising, counselling, tutoring), or may be used to prompt students to complete courses or programs.
- *Management information and student/customer feedback:* A call centre with good software accumulates a great deal of information about customers or students and courses. This information is collected by analysing call documentation data, or by directly presenting questions to the customer or student. The information can range from simple to complex, from student's opinions about university policies or problems with courses, to aiding in the design of web sites and even course design. Distance education institutions should make the collection and analysis of information a major call centre goal, particularly given that the distributed nature of this work makes the collection of such information difficult.

CUSTOMER/STUDENT SERVICE AND RETENTION

The help desk first emerged to help customers and staff of organizations deal with technical problems associated with computer use. Noel Bruton (2002), a well-known information technology (IT) consultant in Great

Britain, notes that the IT help desk took on its current form in the mid-1980s. The call centre concept used today came later, in the 1990s, to deal with issues and queries not related to technology. According to Bruton, a key difference between a help desk and a call centre lies in how the two functions deal with knowledge management. He contends that help desks, while they do impart prepared or pre-manufactured information, also require diagnostic skills from their staff. In addition, we exist in an information society where people desire immediate answers to questions, and the distance education environment is no different (Howell, Williams & Lindsay, 2003). Many colleges and universities support multiple software and hardware platforms. With increasing offerings in online distance education, students will not only be calling with questions related to course content; they will also require technical assistance. Good service to students requires a single contact point for both technical- and content-related questions.

Call centre services to students engaged in e-learning require that call centre staff have diagnostic skills. These skills enable them to work with students to determine the nature of, and solutions to, their course content queries (tutoring), and to work through program issues (advising). To deliver a one-stop shop for students engaged in e-learning, it is important that the diagnostic skills offered by help desk personnel are combined with the directive and prepared services of a typical call centre. In a consolidated call centre/help desk, the use of a knowledge base is important for both functions; however, with diagnostic situations, the bigger issue is usually trying to deduce the actual problem. The knowledge base built up for many course-related, program-related, and technical questions can be straightforward, comprised of simple questions and answers. The knowledge base for diagnostic questions must also include a step-by-step guide for asking questions to determine the nature of the problem, followed by steps for solving the problem. Learning to deduce the actual problem is a unique skill set and takes time to learn.

The staff of an online learning call centre must incorporate skills from both call centre and help desk environments, and have specialists available to deal with particularly complex issues. Good skills within an environment such as this usually include strong communication skills, student (or customer) service experience, and an ability to adapt to new situations. A good set of Frequently Asked Questions (FAQs), complete with step-by-step solutions, should be made available to call centre staff. And, as with course content queries, technical expertise should be available for more complex issues.

Brandt (2002) notes that only 14% of all help desk calls involve new problems that require serious attention, while the remaining 86% could all be resolved automatically, without human intervention, via web-based features. It has also been shown that if end-users are equipped with better documentation or automated self-help web-based facilities, calls to the call centre or help desk can be greatly reduced (Brandt, 2002; Jordan 2003; Lawlor, 2001). Lawlor further points to surveys showing that organizations that reduced the number of help desk/call centre calls by creating self-help options had a higher level of user satisfaction.

Doherty (2001) points out that help desks are typically organized in layers or tiers. Tiers can start at web-based self-help, which Lawlor (2001) designates as *Tier 0*, and move up in the hierarchy to the front-line facilitator, *Tier 1*, through the desktop analyst, *Tier 2*, to the network specialist, *Tier 3*. A consolidated call centre/help desk in education would likewise be layered in tiers. Where possible, web-based self-help (Tier 0) should be developed, providing extensive FAQ files, bulletin boards, and conference and chat areas. These are the least expensive solutions, and provide an immediate source of information. Call centre staff that are the first contact with students are Tier 1, technical experts to whom questions are referred are Tier 2, and the academics serve as Tier 3.

Direct Marketing Opportunities

Early uses of call centres included marketing and promotion, as well as the provision of technical assistance. There are two primary operating modes for these functions. The first is to field calls from current customers wishing to place more orders or discuss products, and from new customers directed to the call centre number by advertising and promotional materials. This is the function that increasingly involves the Internet. The second operating mode for a call centre is the outgoing cold call. A possible customer is identified by region, income, or some other factor, and is called at home with an offer of the organization's product, a solicitation of a donation, etc. A carefully prepared script is provided for the call centre staff to use in their contacts. This is a popular function of a call centre for charities and long-distance phone companies. Call centres are also used to carry out surveys (Coen, 2001; Hitch & MacBrayne, 2003).

In education, the primary use of call-centre technology in marketing and promotion is to field incoming calls from students who have learned of the educational institution through advertising, word-of-mouth referral, Internet search, or other means (Hitch & MacBrayne,

2003). Many institutions accept volumes of queries from prospective students and their parents, for which they provide information about their programs, both educational and extracurricular. Often, large numbers of attendants are only needed during peak recruiting seasons. In distance education, where students are not on campus, there is additional pressure to fill the information needs of current students on a day-to-day basis, typically by answering questions about course availability, helping a student get information about their performance, and so on. Finally, the student advising function, wherein an advisor works through program planning issues with a prospective or current student, is also an ideal candidate for applying the technologies and organizational format found in call centres. The question of cold calling to solicit customers or students is more questionable, but should perhaps not be dismissed out-of-hand. Cold calls could be used to remind students of impending course deadlines, possibly increasing completion rates and future enrolments, or to (re)inform them of potential new course or program opportunities. The structure of such calls and the criteria for initiation would require careful consideration.

Management Information and Student/Customer Feedback

Knowledge management (KM), rather than information management, can be a source of competitive advantage for an organization. A centralized call centre, when coupled with appropriate software, is now a key element of successful organizational strategy. Good knowledge management consists of more than collecting and disseminating information – it includes organizing and analyzing information to provide the maximum benefit for the organization and its customer:

Customer service organizations require easy access to accurate, consistent information in order to answer customers' questions. KM provides the process to capture relevant information and make it readily accessible by agents and customers via self-service. (Jordan, 2003, p. 44)

Greater accumulation of knowledge and good management of that knowledge can allow CSRs to engage in a wider variety of tasks, allowing for greater economies of scales (Mitchell, 2001), and increasing task variety has benefits in terms of user and job satisfaction (discussed below). Good management of data is also important if CSRs are to locate and disseminate information quickly and accurately. It can also increase

the efficiency of the overall operation by increasing CSRs' ability to resolve issues on first contact, rather than requiring a call-back or escalation to another level (Kotwal, 2004).

One of the significant advantages for instructional designers and academics is that CRM software enables tracking of all contacts to a call centre. CRM data can provide information on the nature of all inquiries about a course, and whether they are related to administrative matters or academic content which, in turn, can be mined by faculty or instructional designers. This tracking can identify instructional design issues related to a course and/or identify subject matter that could require supplemental material or remedial exercises to improve student success. Ideally, academics and instructional designers should provide self-service help for distance students. Given that they increasingly want instant access to information (Howell, et al., 2003), this specialized service would be the ideal solution. Also, in distance education, it is typical that one person designs a course while many deliver it; and as enrolments increase, an increasing number of people are involved in course delivery. As a result, KM becomes particularly important in situations of added-course delivery complexity. Collecting relevant feedback from a large group of individuals who deliver a course and from a large number of students enrolled in a course can be improved through CRM software that can track inquiries by course. This provides for a systematic collection of information, and does not suffer from the so-called "recency effect," meaning that people tend to recall the most recent events, or recall errors. Clearly, this software can be particularly useful in the distributed work environment common in distance education. CRM software can help to overcome some of the communication problems associated with distributed work environments by being a central collection point for a myriad of information.

Call Centre Consolidation

It is not uncommon for an organization to have more than one call centre, each one focusing on a specific function. Nonetheless, call centre consolidation makes sense for a number of reasons, including the rapid progression in technological advances enabling better access to organizational information for call centre agents and customers (through KM), and improved employee satisfaction through increasing task variety and skill levels. When there are similarities in the tasks performed and overlap in the services provided by separate call centres, there is potential for economies of scale. An agent in a large group can handle more calls at

a given service level than they can in a small group. Mitchell (2001) points out that “efficiencies” can be achieved up to a call-centre size of approximately 50 agents. After this point, incremental gains are minimal, if they occur at all. While many call centres contain many more than 50 agents, the maximum optimal size for their subunits or teams is 50. Other motivators for call centre consolidation include reduced equipment costs, simplified implementation of new technologies, better control over service quality, reduced management staff requirements, and consolidated KM.

In the past, call centres segmented calls on the basis of skills. Consolidation can also occur within a call centre by rationalizing the segmentation of some agent groups. For example, in a bank, commercial loans require different skills than personal loans. In other settings, technical help requires different skills than service, which requires different skills than sales. According to Mitchell (2001), knowledge management, process management, just-in-time training, and CRM all contribute to the tearing down of skills barriers to service. Mitchell notes that

Today’s segmentation strategies no longer look to agent skills as the basis for routing calls, but instead focus on client value to determine what services to provide through what media. Low value customers get routed to self-service technologies. High value customers get high-touch service. No matter who or what the customer ends up interacting with, the agent, human or computer, has all of the services, corporate knowledge and process flows needed to handle the customer requests. (p. 26)

In an educational environment, the concepts of “low value” and “high value” customers have no place; however, the concept of segmentation is potentially useful. Such segmentation could be based on student characteristics (graduate versus undergraduate, area of study, and so on), as well as the type of query. Many queries may be routed to self-service areas and others are routed to specialized agents. Data collected within the call centre through CRM software will inform the segmentation. Improving KM will allow each agent to handle more diverse and more difficult calls, and as more knowledge becomes incorporated into knowledge systems, training becomes more an exercise in teaching agents the “how to’s” of developing customer relationships than focusing on each product or service offered. This can increase task variety and the skills and training required by CSRs that, in turn, can have a significant

influence on employees' job satisfaction, absenteeism, and retention (discussed below). The integration of call centres also encourages the integration of knowledge management systems that, in turn, increases the consistency of messages from the organization to the customer and provides the organization with a "single face" (Kotwal, 2004). Integration can also lead to increased customer satisfaction, by having one person deal with different inquiries in a single customer contact, rather than requiring customers to make numerous contacts with an organization.

CRITICAL SUCCESS FACTORS FOR CALL CENTRES

Distance education shares the trends affecting many firms in financial service, telecommunication, and technology industries. A dominant trend is the increasing distance from the customer (or student). Phone companies, utility providers, and banks once operated many small outlets scattered throughout cities and were present in every small community; now, however, there are a few large facilities (and increasingly, online services) are backed up by call centres. For call centres to be successful and productive in any field, including distance education, a number of critical success factors must be in place. Successful call-centre implementation requires the development of effective processes and policies, the implementation of appropriate technology, and the adoption of effective human resource management processes (Evanson et al., 1998).

Processes and Policy

Once a call centre business strategy has been developed, and the processes required to carry out the designated objectives have been adopted, it is crucial that those processes be evaluated. A key part of this evaluation involves looking at the types of contacts the call centre is receiving, how contacts are routed, and how contact processes are managed. The call centre should also establish policies and standardized operational procedures. Most importantly, quality monitoring and reporting processes must be in place so that the call centre can continue to meet established objectives.

Call centres had their genesis and have been particularly effective in organizations that received large volumes of calls from customers who experienced uncertain results in seeking the right individual or department to deal with their specific issue. Staff in such organizations were also frustrated and not utilized effectively, as they forwarded calls or tried

to help in areas outside their experience. Now, the direction of calls to one area allows call centre agents to handle queries in volume. Only calls requiring additional expertise not available in the call centre are referred to other areas of the organization. Call centres become a collection point for organizational information as databases are created to allow agents to handle a wider range of queries. Thus, over time, the expertise and information available to a call centre is expanded, so it can handle more incoming calls without resorting to referrals and call-backs.

A call centre concept can also be used to allocate and distribute workload in the organization. Without such a centre, highly paid professionals are often used to handle tasks that underutilize their expertise. A call centre with good call-routing processes can distribute calls to the individuals or automated agents most qualified to handle them. Ideally, all relevant information about a customer and their issues is documented and available to all agents within a call centre using CRM software. In addition, with collaborative systems, several agents can simultaneously work on a particularly difficult issue with a customer, with each staff member contributing their particular expertise in resolving the problem.

Customer-focused organizations use call centres most successfully (Evanson et al., 1998). Many firms seeking to become more customer-oriented purchase and install elaborate CRM software suites that track and record service transactions. If this installation occurs without significant planning, however, and especially if managers are dazzled by the “promises of the technology,” the implementation often fails. Rigby, Reichheld, and Dawson (2003) emphasize that CRM installations work best if the organization starts with a customer strategy, then realigns its structure and processes to fit the strategy, and finally selects the technology that is appropriate for the chosen strategy and processes. Whether implementing CRM technology, call centre technology, or both, the organization must first ensure that its strategy is appropriately customer-focused, and that the technology under consideration fits with that strategy (Hitt, Frei, & Harker, 1998; Rigby et al.).

CRM products have helped call centres to organize some of their customer contact processes, and increase efficiencies and quality of service. According to Kiska (2002), a new approach must be added to follow up on CRM processes. Customer experience management (CEM) is emerging as a means to retain valued customers. It is widely known that retention of current customers is cost effective and highly profitable for an organization (Reichheld, 1996). This can also be true for a distance

education organization that benefits from program or long-term students. A CEM process begins by identifying key measures for customer satisfaction and retention. The statistics it gathers can help organizations make sound decisions when it comes to call centre operations and policies (Kiska). Holt (2000) holds opinions similar to Kiska's, indicating that customer loyalty and satisfaction are closely linked to the success of the organization and call centre:

If call centre operators used customer contact to understand attitudes to the company, to assess brand perceptions, to research responses to marketing activity, and to begin to unlock the secrets of long-term loyalty and advocacy, the value of that call centre operation would increase immeasurably. It will enable other parts of the organisation to assess the relevant issues and take the necessary action. (p. 11)

Technology

Information technology is increasingly important to a wide range of firms, and is the "enabling platform" for call centres, the Internet, and other innovations. Earlier in this chapter, we noted work by Davenport and Short (1990) on the relationship between information technology and business process redesign. Hitt and colleagues (1998) investigated the adoption of technology in the financial industry. They note that research has found IT investment to be a substantial contributor to productivity and productivity growth.

In the last 15 years, various call-centre technologies have become available to the market, including voice-over-Internet protocol (VoIP), customer-relationship-integration tools, and Internet and web communication tools and products. In their study of call centres in the financial services industry, Evanson and colleagues (1998) note that call centres need to ensure their technology is effective or appropriate for its strategy. Krol (2002) indicates that while excesses in the adoption of technology were common in the technology bubble, organizations are now returning to basics. That is to say, call centres are more interested in products that provide mission-critical services. Customer loyalty and service objectives should drive call centre technology investments.

Technology is transforming the traditional call centre, allowing staff to be in contact with customers in a number of different ways, including, but not limited to, email, chat, web browsing, and voicemail.

Finding the right technology is not an easy task, but the first steps must be to determine the organization's needs and to link customers with the information and services they require quickly. Knowledge databases, CRM or customer tracking, CEM or customer follow-up and retention, and handling of multiple contact media must be integrated into a system that is easily accessible to front-line staff, or to customers directly. Automated systems can match customers with call centre staff, based on the customer's profile and the staff member's knowledge focus. The banking industry is experimenting with such "intelligent routing," to direct calls from the bank's best customers to particular representatives (Knowledge at Wharton, 2002).

The first generation of call centres focused on answering telephone calls from customers (students). As the Internet has become more widely used, call centres have made use of it as well. Internet technology allows feedback to customers or students to occur through either of these two channels, and the more flexible Internet media provide a variety of tools, including web chat, asynchronous conferencing, video conferencing, and web call-backs.

Recently, call centres have also begun to make use of web sites to provide their customers with more information. There has been a push to provide customers with Frequently Asked Questions (FAQ) pages, where customers can look up and provide answers to their own questions, while intelligent question-and-answer systems can look up answers for clients automatically (Brandt, 2002). For example, Athabasca University has developed such a tool, called AskAU (see <http://www.askau.ca>).

When considering any of the web-based tools for use with a call centre, it is important to consider their positive and negative aspects, and how they will affect call-centre operations. Since the Internet gives customers (or students) the power to seek out answers on their own, organizations are challenged to develop integrated systems to allow delivery of services that are better and operate faster than those that customers can find for themselves. In addition, people tend to like "multi-channel" services, meaning they may use the web site, but also have direct contact with CSRs. These channels should be viewed as complementary, not competitive.

The Internet is capable of providing vast amounts of information for call centre staff, as well as for current and potential customers or students. Developing user interfaces that make this information quickly available, in a format that satisfies the diverse needs of users, is an ongoing challenge, however. A major impact of the new Internet-based

technologies is that the “service bar” is being raised. If routine issues are handled on the Web through automatic agents, call centres must be in a position to handle more sophisticated calls.

Human Resources

Human, not financial, capital must now be the starting point and foundation for a successful strategy. Financial capital and also technology are increasingly being commodified, and each is found in abundant supply (Bartlett & Ghoshal, 2002). As a result, the skills, knowledge, and ability of an organization’s staff to innovate will increasingly be the distinguishing factors for successful strategy implementation and value creation (Pfeffer, 1994).

Customer service studies show that when something goes right, customers give credit to the individual employee dealing with the problem; when something goes wrong, customers usually blame the organization itself. This makes it crucial for any organization to have the right number of people with the right skills, at the right place and the right time, ready to answer customer demands (Krol, 2002).

Given that personnel costs consume 60% of budgets in call centres (Batt, 2002), recruitment and hiring of front-line and call-centre managers, training and coaching of staff, and ongoing performance management are of critical importance to a call centre’s success. Call-centre staff are the front-line human element for the customer. To promote the reputation of the organization, they need to feel they are a vital part of the organization. Selection of staff with customer service skills, such as excellent communication skills, writing skills, and a positive attitude, is extremely important. It is also important to recruit personnel with appropriate experience and educational background, to ensure they are capable of providing quality services to customers or students.

Training and ongoing coaching is also extremely important, as call-centre environments, technologies, and processes tend to change rapidly. Staff members must be involved in the changes, buy into the new processes, and have the information they need to be able to carry them out.

Assessment and performance checks are essential. What are the employee satisfaction levels? What are your customers saying about the service they are receiving? Retention of staff is as important as retention of customers, so that loyalty to service is maintained. Rigby and colleagues (2003) note that the prime driver of customer loyalty is the loyalty of the organization’s employees. Creating a positive and healthy

environment for employees and empowering employees reduces turnover. Institutions with higher employee empowerment tend to have higher overall employee retention (Evanson et al., 1998).

Adria and Chowdhury (2002) argue that call centres can and should allow employees to upgrade their skills, make more and better decisions, and participate in a team-based organizational culture. Skills training leads to higher employee satisfaction and higher productivity. Frontline staff should be corporate ambassadors for the organization. They also argue that organizations should pursue decentralization and team building: frontline employees are more productive if they are empowered to make decisions and provide input into the operation of the call centre; and customer service is more effective if employees feel they are part of the common effort to achieve excellence.

All of these factors lead to the conclusion that distance education providers need to develop high value-added call centres, coupled with high-commitment management techniques. These techniques include such things as increasing CSRs' discretion, high task variety, reduced surveillance, intensive training, self-directed team-oriented work structures, and the like (Houlihan, 2002; Kinnie et. al, 2000). It is hoped that by increasing CSRs' work satisfaction and retention, customer service will improve.

CALL CENTRES AT ATHABASCA UNIVERSITY

Athabasca University serves more than 32,000 students annually. Courses are offered primarily through independent study, which gives students the flexibility to set their own schedules in terms of time and place and, in effect, to pursue part-time studies and a full-time career if they wish. The university strives to remove the barriers of time, space, past educational experience and, to some degree, level of income. Athabasca University's mission and mode of operation make effective methods of communicating with students and prospective students of central importance. Using the call-centre model to build student satisfaction is an attractive alternative for Athabasca University.

Over the past 15 years, Athabasca University has developed three unique call centres:

- *The Information Centre*, the call centre operating as a "first point of contact," was established in 1995. Information Centre staff field all incoming calls not directed to a private line or to one of the

other call centres, and determine the purpose of the call. Information Centre attendants are well informed about the university's services, programs, and courses, and have access to a wide range of information. Many calls to the Information Centre are redirected to student advisors, to the Office of the Registrar, the Computing Services Help Desk, the School of Business Call Centre, or to course assistants. Prior to 1995, incoming calls came to a single telephone number in the Office of the Registrar, and many calls were lost. In addition, students expressed frustration with their experience in finding the right person in the institution to deal with their particular problem. Since 1995, many of these problems have been resolved, and the volume of calls and students served has increased exponentially. In the past five years, the volume of email queries has also risen rapidly, and an automated information system, *AskAU* (see <http://www.askau.ca>), has been added for students to obtain answers to questions without the intervention of a staff member.

- *The Computing Services Help Desk*, established in 1994, provides technical assistance primarily to help university staff obtain information and support for university computing resources; it helps staff to resolve problems with their Athabasca University equipment and supported software. The Help Desk does provide some assistance to students in computing science and psychology courses, but students are generally referred to appropriate academic units for courseware support.
- *The School of Business Call Centre* was created in 1994 as a pilot project to investigate the feasibility of alternative tutoring methods. It has grown to include almost all School of Business undergraduate courses, which account for approximately 18,000 registrations, or almost 30% of the university's undergraduate course registrations. The Call Centre is the central focus of student support in the undergraduate School of Business, and is integrated with its online course delivery platform, described in detail below.

Call Centres in Distance Education and Distributed Learning

Can a call centre be used as a vehicle for academic coaching and advising? In distance and online education, instructors and students are separated by eliminating the classroom. The historical practice in distance education has been to prepare detailed and thorough learning packages to guide students in their study, and to provide tutorial support

by mail and telephone. The traditional tutor at Athabasca University is the focal point for student/institution contact, with the tutor answering many administrative queries, relaying marks, and directly helping in an instructional role.

In the early 1990s, the business faculty at Athabasca University developed a call-centre model as a “one-window” approach for its instructional tutoring (Adria & Woudstra, 2001). The key to its success has been the development of a groupware, “call-back conference” (an electronic bulletin board), to which call centre staff (referred to as undergraduate student advisors) post student subject-matter queries they cannot answer, and requests by students to speak to the course academic. In this way, academics field only substantive, course-related questions or problematic administrative issues. This system helps ensure that someone quickly responds who can answer students’ questions and discuss the subject matter in depth.

The model also allows for the separation of the tutoring and marking roles, which are combined in the traditional tutor model at Athabasca University, and which can form a bottleneck in the effectiveness and efficiency of the instructional function by preventing the use of economies of scale, in both marking and handling administrative queries. In the traditional Athabasca University model, a tutor is responsible for all academic contacts for an assigned group of 28 to 40 students, and marks all assignments for this group. Tutors, who are paid regardless of whether they have contact with students, are typically available by telephone in three-hour blocks, once per week. Unfortunately, tutors are generally underutilized during this time by students. In the call-centre model, because students in any given course are not broken into groups, administrative questions are answered by the undergraduate student advisors, who form Tier 1 of the model; an academic expert role exists purely for answering students’ academic content queries; and a specialist marker role has been created to handle marking duties.

Under the School of Business call-centre model, students in any course can call a toll-free 1-800 telephone number, five afternoons and six evenings per week. This call centre now provides students with about 60 hours of access to telephone and email assistance each week, and deals with approximately 80% of the calls directed to it (Adria & Woudstra, 2001), thus referring only 20% of the calls to academic support (academics and tutors). Course academics over a broad range of courses are thus freed from 80% of the calls that they (or their tutors) would otherwise receive. Moreover, students’ queries are answered more quickly,

rather than once per week during an academic's telephone contact hours. It is anticipated that the knowledge available to and level of expertise expected of selected staff will increase to allow direct answers to more of the 20% of the queries now referred to academic experts.

Prior to the implementation of the call-centre model, payments to telephone tutors were one of the School of Business's largest expenses. Each academic advisor now handles calls from about three times as many students per week as an average telephone tutor previously did. As a result, student support costs have dropped by approximately 25% in the School of Business undergraduate independent study courses, allowing resources to be deployed elsewhere. In addition, through the use of groupware, an online course-development and delivery system incorporating the call centre was developed for most School of Business undergraduate courses. Online course materials are continually developed and improved, allowing students to access course help through their course web sites, as well as to interact with call centre staff and academics via the Web, using chat or discussion boards.

The call-back conference database enables undergraduate student advisors and academics to track and resolve student queries online. However, the tracking in the call-back conference only accounted for approximately 20% of the student contacts that could not directly be answered by the undergraduate student advisors (Adria & Woudstra, 2001). Beginning in the 2002–2003 academic year, a comprehensive student tracking system has tracked all queries to the call centre, including those handled by the call-back conference, whether by email or telephone. This system is web-enabled and allows academics and other university staff to access the database from virtually anywhere, using a standard web browser. The database can produce reports and statistics on student contacts for use, among other things, in improving courseware. Reports such as these, and tracking information received from call-centre databanks, inform decisions about how services can most effectively be distributed to students.

There are numerous other advantages in addition to the ones already mentioned (i.e., improved data gathering, faster access to information, and reduced costs). When a contact centre is teamed with a central electronic bulletin board for posting academic student inquiries and a collaborative teaching environment (multiple academics and/or tutors assigned to a single course), it allows for the seamless handing-off of student inquiries from one academic/tutor to another, and the monitoring of service standards – factors that reduce the potential for litigation.

When student requests for academic support are posted centrally, an academic administrator can assign and re-assign the academic/tutor contact with the student accordingly. Academics/tutors are thus assigned by the time of day or day of the week that students are available, thereby meeting students' learning needs. Given that Canada spans six time zones, this level of flexibility is of particular importance. Also, in a continuous-enrolment (non-semester) environment, such a system is of great use. When an academic or tutor goes on leave, vacation, or is unavailable (i.e., illness, separation, or negligence), an academic administrator can immediately re-assign academic inquiries to another qualified person. It also allows for monitoring of student inquiries to determine if their queries are being dealt with in a timely manner and in compliance with service standards. Problems quickly come to light in the call-centre environment. This system can be compared to the long delays typical of the direct student-to-tutor model, which is hard to monitor and flag problem areas. Finally, CSRs are continually trained and updated in university policies, procedures, and programs. Under a direct-tutor model, the tutor is often the first line of contact for the student on matters beyond the academic (i.e., administrative). On occasion, academics and tutors have provided erroneous advice on administrative matters, leaving the institution open to litigation; this situation has created more work for administrators, who must then resolve resulting problems. Students are becoming increasingly litigious. As a result, it is in the best interest of the institution to have those with the most up-to-date knowledge – CSRs – provide administrative support to students.

Potential Developments in Athabasca University Call Centres

The Information Centre has operated as an inbound call centre and does not make outward calls, except to return messages. It has been effective in provision of information, which, in turn, supports and facilitates the recruitment process. In the future, there is no reason why the Information Centre could not expand its role to also make outgoing calls to potential students (i.e., high school and college graduates), informing them of opportunities at Athabasca University (should the university decide to pursue such a recruitment strategy). Of course, it would be necessary to balance the drive for efficient outgoing call practices with the need for customer focus. When call-centre staff have time, they could make outgoing calls, but clearly their main focus must be customer-retention calls (Evanson et al., 1998). For example, the School of Business Call Centre contacts students when they appear to be behind

in their course work, and inquires if any support is needed, to encourage them to complete their course(s).

At Athabasca University, there is potential to consolidate the three call centre groups into a single organizational structure; together, they have less than 50 staff and some areas of service overlap. Organizational efficiencies are available. Even without consolidation of functions that involve direct student contact, significant quality improvements could be obtained by centralizing operations, such as centre design, staff planning, network design and management, ongoing standards reporting, IT liaison, contact automation, quality assurance, and training. Consolidation could also simplify disaster-recovery issues, as well as increase the CSR's task variety that, in turn, could improve job satisfaction, retention, and customer service. The integration of call-centre databases could provide a consistency of message and a single face, to help the university build solid relationships with its students.

The three call centres have enough overlap to make the economies of scale attractive. Achievement of such economies would logically involve widening the call-centre service to include all of the university's academic units. Many of the calls handled by the Information Centre deal with academic administration, and thus mirror calls handled by the call centre. The call-centre concept could also be extended to include functions served by the course assistants, who also answer student queries, relay mark and assignment information, and so forth. As more of these functions and those handled by staff from the Office of the Registrar are placed online, the group of services eligible for call-centre service will expand.

OVERCOMING BARRIERS TO CALL CENTRE IMPLEMENTATION IN DELIVERY

It is likely that there will be some resistance to implementing call centres in distance education, particularly with respect to course delivery. In part, using a customer-service model when dealing with students is not universally accepted and the use of the word "customer" when referring to students is in itself controversial. Nonetheless, although distance education providers are increasingly accepted in the mainstream, they are sensitive to criticisms around the commercialization of education and the use of a call centre in the delivery of education. Further, distance education providers are already criticized for their lack of personal

interaction with students (Noble, 2001); implementing a call centre could further distance the learner from the academic, and depersonalize the learning experience even more. As a result, any potential implementation of a call centre on the delivery side of distance education must be strategically considered and carefully framed, so as not to be viewed as another example of universities relying on business models.

Rogers (1995, p. 36) posits that “the characteristics of an innovation, as perceived by the members of the social system, determine its rate of adoption.” Major change requires that changes be framed properly in order for them to be accepted (Garvin & Roberto, 2005; Reger, Mullane, Gustafson, & DeMarie, 1994). When attempting to implement a call centre, senior administration must demonstrate how its implementation is (a) consistent with the culture and values of the organization, (b) consistent with academics’ professional values, and (c) in the best interest of the students and organization.

Distance education “should be built on two foundations: the *needs of the intended students*, and the *learning outcomes of the course or program*” (italics original, Davis, Little & Stewart, 2008), and shifts the education model from the standard campus-centric model to a student-centred model (Yick, Patrick, & Costin, 2005). These are fundamental values of distance education. In addition, students typically want immediate answers to their inquiries, most of which can be accommodated by the call centre. When combined with team teaching and an electronic bulletin board, calls centres can more easily meet the demands of students who require flexibility. Students are also more apt to receive the timely academic support they need, simply because their inquiries are being handled quickly, efficiently, and by the right person. Nonetheless, academics must be reassured about the nature of the inquiries that will be handled by the call centre, and those that will be passed along to academics and tutors.

In short, there needs to be a clear understanding of what is and is not an academic inquiry, so that academics and tutors do not feel threatened. By making a clear distinction between what is and what is not an academic inquiry, the integrity of the educational experience is maintained. The elimination of tedious administrative inquiries, for which academics and tutors typically have little or no interest and/or training, should also be appealing. Indeed, academics and tutors tend to be more interested in having thoughtful interactions with students, not dealing with routine administrative matters. If one can take the savings gained from implementing a call centre, and encourage course

designs that increase meaningful interaction with students, such a model should be particularly appealing. The addition of more meaningful interaction adds to the value of the course and helps negate criticisms of distance education, specifically that it is an industrial model of education with little or no student-academic interaction. It would both improve the quality of students' learning experience and academics' teaching experience. CRM software could provide academics with valuable insights by gathering student inquiries on certain courses into a single location for analysis, a feature that could be valuable for course re-writes. When many people develop and deliver a course in a distributed work environment, CRM software could be particularly helpful.

Distance education students often feel isolated, as they tend to lack a community of learners upon which to rely. Having a single, instant source of support can reduce student frustration in attempting to gain information. Students in distance education are less able to rely on other students to gain information needed to navigate educational and institutional issues. A single, instant source of support can also help build the relationship between the student and the institution. The improved level of service to the student, in terms of obtaining timely academic assistance, may improve completion rates and increase student retention, both tangible benefits to students and the institution. The institution also benefits by being able to more proactively manage the student relationship, ensuring that their learning needs are met in a timely manner. The student, on the other hand, benefits from the provision of instant and accurate administrative information.

CONCLUSION

There are viable opportunities for the use of call centres in distance education. Call centres can provide a strategic opportunity for an institution facing dramatic increases in student numbers. Call centres hold the potential to reduce costs, improve student retention, improve student service, and possibly even improve student success. Nonetheless, those contemplating implementing a call centre in distance education must be cognizant of the criticisms associated with call centres, and thus should strive to develop a value-added call-centre model. By utilizing high-involvement human-resource practices, meaningful and engaging jobs can be designed that hold the potential to improve user satisfaction and reduce employee absenteeism and turnover.

Over time, the roles and responsibilities of a call centre could expand, and with sufficient economies of scale, might even be able to provide direct academic support, rather than just provide for the escalation of academic inquiries beyond the call centre. The advantages of a call centre are numerous; however, attempts to implement a call centre in distance education will likely meet some resistance. As a result, carefully framing the issue in terms of fundamental organizational and professional values, and clearly outlining these advantages to students, academics, and the institution, will be essential in order for call centre implementation to be successful.

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