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## From performance management to managing performance

An embedded case study of the drivers of individual- and group-based performance in a call center context

Larsson, Nathalie

2016

*Document Version:*

Publisher's PDF, also known as Version of record

[Link to publication](#)

*Citation for published version (APA):*

Larsson, N. (2016). *From performance management to managing performance: An embedded case study of the drivers of individual- and group-based performance in a call center context*. Lund University (Media-Tryck).

*Total number of authors:*

1

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LUND UNIVERSITY  
School of Economics and Management

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An embedded case study of the drivers of individual- and  
group-based performance in a call center context

NATHALIE LARSSON | INSTITUTE OF ECONOMIC RESEARCH



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Managing performance is critical for realizing certain economic benefits when managing customer relations in call centers. However, prior call center research is fragmented and under-analyzed, which contributes to a limited understanding of the underlying elements for performance and complexities in managing individual- and group-based performance in call centers. The purpose of this thesis is to further our knowledge of how to manage performance in call centers.



The findings from this qualitative study of four embedded cases in a Swedish company operating in the utilities sector provide empirical evidence of how call center agents and management manage performance. I propose that coping and the effects of coping strategies on performance constitute the primary link between contextual, control-based, cultural elements and performance outcomes. I found that call center agents handled their lack of knowledge of how to effectively solve (or not solve) a perceived problem by adopting various coping strategies. Such strategies were influenced by the amount of experienced coping over time and supported by dysfunctional prevailing performance-management systems. These coping strategies determined individual- and group-based performance in this call center setting.

Based upon these findings, I suggest a more proactive role for middle managers in handling the underlying causes of these coping strategies, rather than their consequences, in terms of performance impacts. I also propose suggestions to management for handling internal challenges generated by a dysfunctional performance-management system in these call centers. I also provide additional managerial guidelines for managing customer relations and performance in call centers, such as how to align call center operations with company vision.



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Nathalie Larsson



**LUND**  
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DOCTORAL DISSERTATION

by due permission of the Department of Business Administration,  
School of Economics and Management, Lund University, Sweden.

To be defended at Holger Craaford Ekonomisentrum EC1:136.

Date 14<sup>th</sup> October 2016 at 14.00.

*Faculty opponent*

Professor Søren Henning Jensen

Organization LUND UNIVERSITY	Document name Doctoral Dissertation	
School of Economics and Management	Date of issue: 14 <sup>th</sup> October 2016	
Author: Nathalie Larsson	Sponsoring organization	
<b>Title and subtitle</b> From performance management to managing performance: An embedded case study of the drivers of individual- and group-based performance in a call center context		
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<b>Key words</b> Performance, call centers, customer relations, coping, management, B2C interactions		
Classification system and/or index terms (if any)		
Supplementary bibliographical information		Language: English
ISSN and key title 137		ISBN: 978-91-7623-826-4 (print) 978-91-7623-827-1 (pdf)
Recipient's notes	Number of pages: 278	Price
	Security classification	

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Institute of Economic Research

ISBN 978-91-7623-826-4 (print)

ISBN 978-91-7623-827-1 (pdf)

ISSN 137

Printed in Sweden by Media-Tryck, Lund University  
Lund 2016



*If you wait for perfect conditions,  
you will never get anything done.*



# Acknowledgements

The PhD process can be a five-year-long journey filled with moments of frustration, stress and disbelief, but also joy, laughter, confidence, and happiness about accomplishments. Earning a PhD is a learning process that enabled me to see the world from various perspectives and showed me that all goals are achievable if you have enough energy and persistence to pursue them.

However, this thesis would still not be finalized without support. My grateful thanks first go to my main supervisor, Thomas Kalling, for his belief in my abilities, his constant availability to discuss various problems, and his high expectations. He has both supported and motivated me through this entire process, particularly in his recurring encouragement to make the thesis more coherent (Make it shorter! Simplify!). I would also like to thank my second supervisor, Lisen Selander, for her sharp advice, attention to detail, and encouraging support during my research process.

I am also sincerely grateful for the insightful comments I received from the opponents over the years: Dan Kärreman, Lars Bengtsson, and Matts Kärreman. Their constructive advice and comments helped me develop my thoughts and improve the manuscript throughout this process. I also want to thank James Morrison for editing this manuscript.

I would also like to thank all managers and employees at Eon Customer Support for allowing me extraordinary access to study their organization during my project. Without their support and interest, there would be no content for this thesis. Collecting data at Eon Customer Support was valuable and interesting, but the managers and employees also made it a lot fun!

Many thanks to my dear colleagues at the Institute who brightened my workdays and provided useful advice over the years. Thank you Nukky, Yaqian, Clarissa, Maria, and Wen for letting me vent off steam during our hot-pot/food evenings. I would also like to thank Vicky, Tomas H, Martin, Linn, Magnus, Barbara, Jayne, Erik, Sanne, Ana-Paula, Jörgen W, Lena,

Amalia, Kaj, Christian, Agneta, Fransisco, Stefan, Daniel Y, Elsbeth, Pelle, Niklas, Anna, Markus, Louise and Sinan for all their joy and pep talks at work.

On a more personal note, I am also grateful to my wonderful family for their love and encouragement during this process. My parents, my sisters and their families, together with Mattias' family and relatives, have all made me appreciate the small joys in life during difficult times.

I am also grateful for my beloved friends that did not give up on me, even though I did not have time to meet with them for more than two hours at a time: Maria, Ellen, Lisa, Gisela, and Anja. I also want to thank all my swimmer friends who enabled me to keep my mind elsewhere!

Finally, I wish to thank my personal coach, best friend, and cheerleader: Mattias. Without your never-ending support with love, food, coffee, pep talks, and understanding when evenings and weekends were spent with the computer instead of enjoying life with you and Myra, this thesis would never have been finished. Your cheerful spirit makes all problems disappear just by being around. You also taught me the most important lesson of how to achieve academic goals: Just do it. It will need a refinement later anyway.

*Staffanstorp, August 2016*

*Nathalie*

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# Chapter 1 | Introduction

It's a routinized work on the basis that we deal with customers on phone everyday and my work tasks are the same from day to day... But on the other hand, the questions we get from customers are very diverse which makes it [the work] constantly changing. And at the same time, our performance is constantly being measured both to the right and left. It's hard to match those targets, and then to set it in contrast to also make the customer satisfied (Agent, December 2012).

## 1.1 Managing customer relations in call centers

Managing customer relations<sup>1</sup> through skillful, effective, service delivery is obviously central to organizational performance. This is especially true in business environments in which products are not particularly differentiated (Abdullateef et al., 2014; Noon, Blyton, & Morrell, 2013). Call centers<sup>2</sup> are a cost-effective organizational strategy to manage relationships with private and business customers in companies of various sizes within various business sectors (Anton & Belfiore, 2012; Batt, 2011; Chambel & Alcover, 2011). Customer relations in call centers is managed through sophisticated integrated communication technologies (ICTs), such as switching and routing technologies. These ICTs enable companies to reach a large number of potential customers. They also facilitate call center agents'<sup>3</sup> ability to help customers resolve issues through an

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<sup>1</sup> *Customer relations* is generally defined as: "The way that a company or organization deals with its customers, and the relationship it has with them" (Cambridge Dictionary, 2016).

<sup>2</sup> In this study, a *call center* is defined as: "A specialized office where agents remotely provide information, deliver services, and/or conduct sales, using some combination of integrated telephone and information technologies, typically with an aim to enhancing customer service while reducing organizational costs" (McPhail, 2002, p. 10).

<sup>3</sup> *Call center agents* operate at the bottom of the organizational hierarchy and are the core workforce of call centers (Anton & Belfiore, 2012).

electronic interface, such as via telephone, e-mail, and web-based services (Anton & Belfiore, 2012; Batt, 2011).

Given that services are recognized as a competitive differentiator, successfully managing customer relations consequently places high demands upon call center agents and their abilities to meet various demands in an effective way (Anton & Belfiore, 2012; Dimension Data, 2015; Pyon, Woo, & Park, 2011). Call center agents' execution of tasks is the key element of service delivery (de Cuyper et al., 2014). Given their "boundary-spanning positions" (Noon et al., 2013, p. 179) in which they are required to solve a range of various tasks, call center agents are increasingly recognized as key representatives of the organization (Chambel & Alcover, 2011; Dimension Data, 2013; Noon et al., 2013). Call center agents are required to resolve routine, new, or/and complex problems while reaching internal performance targets set for them (as illustrated in the quote above). Therefore, how customer relations are managed in the call center depends upon how call center agents handle their work (Dimension Data, 2015).

High demands on call center agents' performance and skills are also linked to enhanced pressure and challenges for call center managers (Dimension Data, 2015). Previous research points at the increasing importance of middle managers, whose key task is to help agents to carry out services and sales in line with internal objectives and external requirements (Banks & Roodt, 2011; Downing, 2011). Succeeding at these managerial efforts is especially important for reaching the overall aim of the business, which in turn, determines an organization's ability to adapt to increasing pressures of a competitive business climate (Ellis & Taylor, 2006; Gans, Koole, & Mandelbaum, 2003; Homburg, Schäfer, & Schneider, 2012).

### **1.1.1 Managing performance in call centers**

In call centers, as in most organizations, performance is at the core of business operations (Bain et al., 2002). *Performance* is an umbrella concept with outcomes, meanings, and implications that vary according to scholars' interest and study focus (Tuten & Neidermeyer, 2004, p. 28). In this study, performance is emphasized as a concept that represents actual achievements, or outcomes that can be measured and established by organizations through various performance metrics (so-called key performance indicators, KPIs).

Performance in call centers aims to realize certain economic benefits through reduced costs. Call centers allow companies to cut costs in customer interactions, such as by using ICTs, scale of workforce, and centralized, streamlined control systems. These, in turn, allow for adjusting and coordinating staffing to current call volumes (Batt, 2011; Besanko et al., 2009; Moss, Salzman, & Tilly, 2008; Olofsdotter, 2012; Shire et al., 2009). Call center operations can also be organized to primarily emphasize customer- or quantity-oriented objectives (Anton & Belfiore, 2012; Armony & Gurvich, 2010) to maximize agent and team efficiency and productivity when managing customer relations<sup>4</sup> (Norman, 2005; Zapf et al., 2003).

Managing customer relations and performance in call centers have certain revenue-related effects. For example, ICTs provide call center agents with full access to a range of updated customer data to provide personal, extended, and additional services with greater convenience and more reliable information delivery. This allows call centers to realize certain service benefits (Gnaur, 2010; Labach, 2011; Walker et al., 2002). By offering greater access to a company's services and products (such solving complaints quickly at no charge), potential limitations of business hours and geographical barriers between companies and customers are also eliminated (Chambel & Alcover, 2011). Call centers' high access is significant for attracting new customers (Jack, Bedics, & McCary, 2006; Milner & Olsen, 2008).

In addition, blending traditional service operations with sales-related activities, such as selling additional products or/and services to customers (cross-selling) and upgrading customers' existing products and/or services (up-selling), also enable call centers to obtain important sales revenue (Armony & Gurvich, 2010; Chou, 2011; Downing, 2011; Jasmand, Blazevic, & de Ruyter, 2012). Prior studies highlight that call centers can leverage information accessibility better than any other marketing tool (such as by saving purchase data and personal profiles), which allows call center agents to tailor sales offers to each individual customer to increase

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<sup>4</sup> Other variations for organizing call centers include dividing work between front-office (responding to, and resolving, incoming customer calls) and back-office operations (solving more complex and administrative tasks with low or no customer interaction) (Breathnach, 2000; Richardson & Gillespie, 2003), in-house (a specialized department of a larger company) and outsourced operations (an independent firm offering services and sales as a contractor for other companies), or inbound and outbound calls (Kleemann & Matuschek, 2002; Koole & Mandelbaum, 2002; Raz & Blank, 2007; Rowe, Marciniak, & Clergeau, 2011).

the likelihood of purchase. Including sales into customer service operations contributes to additional service benefits, such as greater customer satisfaction and loyalty (Dimension Data, 2013; Jasmand et al., 2012). Given increasing pressures to reduce costs, sales performance has become crucial for managing customer relations in cost-effective ways (Butler, 2004; Dimension Data, 2013).

Prior research and reports highlight both external and internal challenges when managing performance in call centers, which can undermine the company's ability to obtain these economic benefits.

### *External challenges*

The most important strategic performance metric for succeeding with managing customer relations concerns customer care and experience (Noon et al., 2013, p. 177). Call centers aim to meet customer requirements for efficient, personalized delivery of service (and sometimes sales), which includes effective resolution of customer issues (Dimension Data, 2015). Given that a significant amount of customer inquiries frequently recur, companies have (through customer data) many opportunities to standardize consistently high levels of service quality and organize business operations to better adapt to, meet, and satisfy customers' demands and expectations for service delivery (Dean & Rainnie, 2009; Holman, 2003b; Labach, 2011). Still, multiple reports agree that customer satisfaction scores of call center interactions with companies in the US and Europe are decreasing year by year (Accenture, 2012; Deloitte, 2013; Dimension Data, 2015; Jaiswal, 2008). The difficulty in satisfying and meeting changing expectations and demands of a diversified, globalized pool of customers is one of the most critical aspects of call center performance (Dimension Data, 2013).

### *Internal challenges*

The literature recognizes three internal challenges in managing customer relations and performance in call centers. First, since sales interactions can contribute to increased workload for call center agents, aligning service delivery and sales operations in call centers is challenging (Gurvich, Armony, & Maglaras, 2009; Jasmand et al., 2012). Training agents to become good salespeople while retaining agents who are top performers in complex errand resolution is critical to call center performance (Downing, 2011).

Second, inherent features of the call center structure can complicate agents' work in other ways. More specifically, changing customer demands are associated with the challenges of training and motivating agents to skillfully handle complex inquiries and routine issues across a variety of digital channels (Dimension Data, 2013; 2015). Prior studies showed that a strong emphasis on managerial control, high work pace, and task routinization in a noisy office landscape can stress call center agents, which can lead to exhaustion (Armony & Gurvich, 2010; Bain et al., 2002; Houlihan, 2002).

Third, call centers are also required to reach a number of pre-determined performance targets to successfully operate (Jasmand et al., 2012; Raz & Blank, 2007). These targets should ideally be perfectly related to each other but more often generate underlying tension and complexity in the call center work environment (Cunningham, James, & Dibben, 2004; Fleming & Sturdy, 2011; McPhail, 2002). The tension between various performance targets can cause a trade-off, in which agents make different choices in how to prioritize and carry out their work (Gilmore, 2001). This trade-off reflects prioritizing either the number of calls answered (fulfilling quantitative performance targets) or spending time to understand customers' needs (emphasizing qualitative performance targets) (Batt, 2000; Taylor & Bain, 2001). In turn, the tension influences how customer relations are managed, which includes whether to prioritize speed and efficiency, or high service quality and customer satisfaction (Raz & Blank, 2007).<sup>5</sup> Companies that fail to address these internal challenges may face the risk of high rates of personnel turnover and/or health problems and low levels of employee motivation (Norman, 2005).

In sum, successful call centers must navigate external and internal challenges to avoid low customer satisfaction, customer losses, and increased operating costs (Dimension Data, 2013; Hillmer, Hillmer, & McRoberts, 2004). The challenges and complexities associated with managing customer relations in call centers provided hints regarding the importance of successfully managing performance among call center agents, teams, and management in this type of organization (Bain et al., 2002).

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<sup>5</sup> The trade-off between quantity and quality is well-studied in call center research. There is more evidence that quantity and short-term result thinking is favored over the qualitative approach (Knights & McCabe, 1998; Wickham & Collins, 2004).

## 1.2 Theoretical standpoints

Call center research emerged from many different theoretical perspectives, such as management, sociology, economics, psychology, and industrial relations (Aksin, Armony, & Mehrotra, 2007; Connell & Burgess, 2006). Although performance and customer operations in call centers have attracted significant interest among scholars, existing call center studies have made contributions primarily within three major streams of research.

The first stream of research is conceptual, in which scholars primarily described the call center phenomenon with the main interest as the call center, *per se*. The unit of analysis in this stream of literature is the call center organization. For example, it may represent a specific socio-technical system (Adria & Chowdhury, 2004; D’Cruz & Noronha, 2007; Workman & Bommer, 2004). In these studies, performance is generally addressed as an important cornerstone for controlling the organization (Bain et al., 2002; Batt, Doellgast, & Kwon, 2004), but is never empirically studied. Given that this stream of research is non-empirical, it does not include actual studies of the relationship between various underlying elements and performance, but rather refers to performance in terms of product and operational costs, value for money, convenience in terms of access, and customer satisfaction.

The second stream of call center research is guided by an instrumental focus, most often by applying an operations-management perspective. This research is primarily concerned with developing, experimentally or numerically testing, and analyzing various types of rationalization models (such as optimization, queuing and simulation models) aimed at implementation in the call center setting (Akşin & Harker, 2003; Legros, Jouini, & Dallery, 2015). Performance is typically defined by the length and volume of calls (as proxies for efficiency), in which researchers generally address a linear process between efficiency and operational costs (Armony & Gurvich, 2010; Kim, Lee, & Choi, 2005). The main starting point for the majority of these studies is the importance of cutting costs, decreasing customer waiting times, optimizing staff scheduling, creating tools for workload forecasting, and estimating future demands of incoming calls (Brown et al., 2005a; Kawai & Takagi, H, 2015; Goldberg, Ritov, & Mandelbaum, 2014).

A third stream of research primarily applies a labor-process theory perspective, with a specific interest in cognition. Scholars generally advocate either a pessimistic<sup>6</sup> or an optimistic<sup>7</sup> view of call centers (Richardson & Howcroft, 2006). Scholars advocating a pessimistic view have described call centers as being “Tayloristic factory conditions” (Bain & Taylor, 2000) and “bright satanic offices” (Baldry, Bain, & Taylor, 1998).<sup>8</sup> These pessimistic metaphors are intended to illustrate the limiting and often highly controlling working conditions for call center agents (Bohle et al., 2011; Fleming & Sturdy, 2011). The general approach in these studies is also that organizations view agents as replaceable parts in a mass production system in which performance is monitored every second (Houlihan, 2002; Jack et al., 2006). As a consequence, this stream of research illustrates call center work and carrying out simple tasks as generating emotional exhaustion, burnout, stress, and depression (Consiglio et al., 2013; de Cuyper et al., 2014; Rowe et al., 2011; Sharma, Sharma, & Tiwari, 2011). This stream of research typically pays little attention to performance and the strategic condition of the organization, but rather favors the perspective of the individual call center agent.

Conversely, scholars advocating an optimistic view (also referred to as the cheerleading approach) (Korczyński, 2002) typically illustrate agents as satisfied knowledge workers who are committed to their job. The work diversity enables them to deliver valued, high-quality service by demonstrating positive emotions and attitudes (Biron & Bamberger, 2010; Koskina & Keithley, 2010; Rose & Wright, 2005). In this line of research, performance includes service quality (Dean, 2007; Dean & Rainnie, 2009; Rafaei, Ziklik, & Doucet, 2008), customer satisfaction (Kim et al., 2005), and productivity (Das, 2003; Hausknecht & Trevor, 2011; Tuten & Neidermeyer, 2004). Other performance indicators include efficiency (Koskina & Keithley, 2010), sales rates (Batt, 2002; Batt & Colvin, 2011), and sales revenue (Grant, 2013).

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<sup>6</sup> *Pessimism* refers to: “A tendency to see the worst aspects of things” (Oxford University Press, 2016e), compared to *critical* research, which refers to: “The objective analysis and evaluation of an issue in order to form a judgment” (Oxford University Press, 2016a). Pessimistic research in this study is non-objective but biased toward a pessimistic view of call centers.

<sup>7</sup> *Optimism* refers to: “Hopefulness and confidence about the future or the success of something” (Oxford University Press, 2016d).

<sup>8</sup> Additional examples of pessimistic labels include: “The modern equivalent of the factory sweatshop,” “customer-oriented bureaucracies” (Korczyński, 2001), “dark satanic mills,” and sites or “mills” of “battery farming” (Arkin, 1997; Baldry et al., 1998, p. 164; Fernie & Metcalf, 1998).



### **1.2.1 Research gap and positioning**

Careful review of existing call center research reveals that the varied interests of call centers provide fragmented insights with shifting scopes and depths of findings (Collin-Jacques & Smith, 2005). This fragmented view contributes to a limited understanding of the underlying elements for performance and complexities in how to manage performance in call centers (Gamble, 2006; Russell, 2008). For example, the two opposing views with a cognitive focus highlight overly unilateral perspectives of the complexities that do not explain the true nature of the call center context (Beirne, Riach, & Wilson, 2004; Knights & Odih, 2002; Korczynski, 2002). In addition, examinations of how various managerial strategies and practices affect performance are needed, since prior studies showed mixed results (Batt & Moynihan, 2002; Castilla, 2005; Dean & Rainnie, 2009; Houlihan, 2001; 2002; Rowe et al., 2011). The role of organizational structures and practices should be further explored, as these elements might influence workers' motivation and performance (Rowold, 2007). There is also a lack of research on the relationship between individual capacities and performance in the call center context (see Chapter 3.4.2) (Dean & Rainnie, 2009; Gnaur, 2010; Sawyerr, Srinivas, & Wang, 2009; Witt, Andrews, & Carlson, 2004). In sum, prior call center research suffers from being fragmented and under-analyzed (Piercy & Rich, 2009). These shortcomings call for a study that aims at furthering our knowledge of how to manage performance in call centers, which can help us understand their nature while helping improve call center management from a variety of perspectives.

#### *Limitations regarding group-level organization*

There is also a limited amount of research examining the group-based perspective of the call center context. More specifically, there is a general lack of insights regarding the dynamics of teams and how individual variation may influence the collective in call centers (Batt, 2004; Jackson, Joshi, & Erhardt, 2003). Scholars generally describe call center agents as structured into homogeneous teams (Fleming & Spicer, 2004; Jouini, Dallery, & Nait-Abdallah, 2008; Piercy & Rich, 2009), but do not further explore how teams may vary. However, the team may be a meaningful level of analysis since agents are structurally, psychologically, and socially embedded in teams (Consiglio et al., 2013). Although scholars have emphasized the importance of understanding the impact of teams in the call center context (Batt, 2004; Batt & Colvin, 2011; Castilla, 2005;

Townsend, 2005; van den Broek, Barnes, & Townsend, 2008), only a few acknowledge this significance.

The majority of prior studies are also limited regarding the impact of interactions on performance between individuals within teams (Townsend, 2004; van den Broek et al., 2008; Workman, 2003). Given that performance in call centers is generally measured at the individual level (although performance implications are usually made at the organizational level) (Batt, Doellgast, & Kwon, 2006; Jack et al., 2006), findings regarding variations in group-level performance are also limited. Exploring why some teams are associated with better performance is crucially needed, as this study area has been overshadowed by other research interests in current literature (Batt & Moynihan, 2002; de Ruyter, Wetzels, & Feinberg, 2001; Grugulis & Stoyanova, 2011; Townsend, 2005).

Consequently, the great majority of prior research on call centers has either primarily focused on addressing issues from a macro-level (which refers to understanding call centers from an organizational approach in this study) or a micro-level perspective (focusing on the individual level). The macro-level perspective typically involves research on the organizational structure and strategy, and understanding call center work as a socio-technical system (see examples in Callaghan & Thompson, 2001; 2002; Houlihan, 2000; Saltzman & Mehrotra, 2001). The micro-level includes studies that focus upon stress, burnout (Holman, 2003a; Tuten & Neidermeyer, 2004), and emotional and physical well-being (Koskina & Keithley, 2010; Norman et al., 2004; Witt et al., 2004). The micro-level perspective also dominates in studies of resistance (Fleming & Sturdy, 2011) and coping (Korczynski, 2003), but also in those concerned with call center agents' emotions in more general terms (Bohle et al., 2011).

### *Limitations regarding performance*

Thorough reviews revealed three particular limitations in how performance has been treated in prior call center research. First, there is an apparent vagueness in defining performance outcomes and describing actual performance implications in detail. For example, by vaguely describing implications upon *task performance*, *worker performance*, or simply *performance* (Higgs, 2004; Wegge et al., 2006), scholars have few insights into the actual effects upon performance in call centers. Given that these scholars do not define these operationalizations of performance,

or elaborate upon or problematize performance links any further, these studies only increase our understanding of performance in the call center context to a limited degree (see Adria & Chowdhury, 2004; Ravishankar & Pan, 2012). Instead, performance is mainly discussed in general terms. This shortcoming impedes the ability to unravel the black box of the link between various elements<sup>9</sup> and performance (Boselie, Dietz, & Boon, 2005). Although an effect upon performance might have been addressed, prior studies still do not clarify why and how these effects are experienced in the call center context (see examples in Dean & Rinnie, 2009; Malhotra, Budhwar, & Prowse, 2007; Raz, 2007; Raz & Blank, 2007; Rowold, 2007). The underlying problem with the research on performance in the call center context is not only based upon the use of poorly defined performance metrics, but also upon vaguely described and problematized causalities for performance (Fine & Nevo, 2008). This shortcoming has not only contributed to an absence of analytical discussions regarding what and how various elements influence performance in the call center context, but it has also inhibited in-depth insights into how elements that are significant in the call center setting influence performance.

Second, reviewing performance in prior research further establishes that we lack insights regarding the complexity of managing customer relations in call centers. The majority of call center studies primarily address one or two performance metrics (Batt & Moynihan, 2002), such as the impact upon service quality and customer satisfaction (Jaiswal, 2008), service quality and sales rates (Jasmand et al., 2012; Rafaeli et al., 2008; Skarlicki, van Jaarsveld, & Walker, 2008), service quality and productivity (Biron & Bamberger, 2010; Hausknecht & Trevor, 2011), or call efficiency and service quality (call quality) (Knights & McCabe, 2003). The sparse use of performance metrics in prior studies is rather surprising considering that call center organizations typically adopt and operate with a range of established performance metrics (KPIs) for optimizing different types of outputs (Hausknecht & Trevor, 2011; NAQC, 2010; Sewell, Barker, & Nyberg, 2011). In line with this shortcoming, scholars addressed a need to further acknowledge the heterogeneity of call center work (such as variance in job tasks, impacts of complex tasks compared to routine transactions), which is absent in current call center literature (Renn & Fedor, 2001; Thompson, Warhurst, & Callaghan, 2001; Wallace, Eagleson, & Waldersee, 2000).

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<sup>9</sup> In this study, *elements* are defined as parts that influence a result.

As a consequence of this sparse use of performance metrics, there are also few studies that examine the trade-offs between similar outcomes (such as between sales rates and customer satisfaction), which are important to address in call centers, since both performance outcomes might be difficult to maximize simultaneously (Batt & Moynihan, 2002). A wider analytical perspective regarding performance must be applied to further our knowledge of how to manage performance. It is not sufficient to carry out studies based only upon the use of qualitative or quantitative performance metrics (Ellis & Taylor, 2006) or a small number of metrics. Further research must include a larger number of performance metrics (Aksin et al., 2007). Empirical research aimed at understanding multiple levels of performance is scarce, at both the individual and group levels, yet is crucially needed (Brown et al., 2005a; Hausknecht & Trevor, 2011).

Third, reviewing call center research also highlights the general lack of using objective performance data (Boselie et al., 2005; Brown et al., 2005a; Downing, 2011; Mahesh & Kasturi, 2006). Call center performance has generally either been measured and evaluated by agents' own self-ratings from conducted surveys, and/or by managers' perceptions and subjective opinions of their workers' performance levels (see examples in Baranik et al., 2014; de Cuyper et al., 2014; Fine & Nevo, 2008; Mahesh & Kasturi, 2006; Rowe et al., 2011; Sawyerr et al., 2009). A limited number of studies have used actual performance data from organizations' performance systems, which may allow coherent empirical objectivity in analyzing performance in call centers (Castilla, 2005; Chen et al., 2011; Downing, 2011). This review highlights that there is much more needed in the way of theoretical and empirical developments of how to manage performance and customer relations in call centers (Gnaur, 2010; Rainnie et al., 2008).

## 1.3 Research purpose

On the basis of the literature review, the purpose of this study is to further our knowledge of how to manage performance in call centers. This purpose aims to be fulfilled by answering the research question: *Which elements influence performance in a call center context, and what are the implications on the individual and group-level?*. Answering this question will allow for additional insights regarding the premises of when call centers function well and how they exist and survive. These insights may provide indications of how call centers will develop further.

The nature of the research question requires a broad theoretical approach. Instead of using one formal theory to fully explore a theoretical perspective, the literature review instead shows a demand for literature that can make sense of rich empirical descriptions, which can then fill gaps within existing literature. In addition to existing call center literature, which has contributed to a context-specific and basic understanding of the interest for this study from various aspects, this literature is supplemented with theory regarding structure, control, and culture. Additional perspectives and insights of B2C operations for furthering our knowledge of performance and its antecedents will be based upon organizational studies of management and business (such as leadership and strategy research), studies with a psychological and sociological perspective on organizations, and studies based on organizational behavior. Utilizing and integrating sources from these diverse research fields can create a comprehensive theory and a broad explanatory model for furthering our knowledge of how to manage performance in call centers, which will fulfill the purpose of the study. I will elaborate on this in the following chapter.

## 1.4 Outline of the thesis

Chapter 2, which is the first of the two theoretical chapters, describes call center performance. This chapter presents how performance has been conceptualized in prior call center research, which will include a presentation of various performance metrics.

Chapter 3, which is the second theoretical chapter in this thesis, introduces the supposed antecedents of performance in the call center context. The

presentation of these antecedents is generally referred to as *elements* in this study and is based upon findings in prior research. The preliminary theoretical framework is presented at the end of Chapter 3, which includes prior theory regarding both performance and the elements influencing performance (theory from Chapters 2 and 3).

Chapter 4 addresses the research method, which will include the choice of case company as well as considerations in relation to the selection of the four embedded cases. The chapter will also present the utilized strategy for data collection to fulfill the purpose of the study. The analytical approach of the empirical material is also clarified in this chapter, which is followed by a presentation of how validity and reliability has been met and acted upon during the process of the study. Considerations regarding the structure of the empirical presentation (in Chapter 7) are also explained in this chapter.

Chapters 5 to 7 represent the empirical chapters of this thesis. These chapters aim to capture how performance is managed and which elements influence performance at the individual and group levels in this context. Chapter 5 introduces the case context to set the stage for this study and describes the selected case company, the industry within which it operates, company background, and other features of interest. Illustrations and descriptions of the organizational structure, members and work situations are also included in this chapter. Chapter 6 presents performance at Eon CS. This chapter describes and illustrates how performance is conceptualized and understood in the case company. Based upon this view and subsequent analysis, the three performance categories that will structure the outcomes in the empirical presentation (in Chapter 7) are presented. The performance-measurement system and evaluation criteria for performance levels at the case company are also included in this chapter. Finally, Chapter 7 presents call center agents' and managers' responses of which elements influence performance in their call center context. These responses have been structured according to four analytical categories to provide rich, detailed data regarding what elements and how these elements influence performance in this call center context. Empirical manifestations of each of the four elements and their impact upon individual- and group-based performance will highlight details and overviews to fulfill the purpose of this study.

Chapter 8 draws on the empirical findings from the previous chapters regarding the four elements that influence performance in this call center context and discusses them in relation to prior theory. In this chapter, in

which I analyze the four C's of organizational behavior in a call center setting, my empirical findings are related to findings and studies of other types of call centers worldwide. This analysis results in a revised theoretical framework that is illustrated in this chapter and discussed in relation to the preliminary theoretical framework (presented in Chapter 3).

The concluding Chapter 9 summarizes the theoretical and practical conclusions and implications of this study, which is followed by reflections regarding validity, limitations, and suggestions for future research.

# Chapter 2 | Call center performance

In prior research, *business performance* is a concept with multi-dimensional meanings (DeNisi, 2000; Lenz, 1981; Ogbonna & Harris, 2000; Venkatraman & Ramanujam, 1987). For example, organizational performance is generally understood from an economic perspective on outcomes, such as linking organizational activities to rates of return and firm profitability (Tvorik & McGivern, 1997). In prior management literature, performance is regarded as a tool for measuring profitability and other outputs in a company, at both the organizational and individual levels (Lenz, 1981). However, performance from a knowledge-generating view can express competence (Zuboff, 1988, p. 182). The fact that scholars between and within research fields understand the concept of *performance* differently means that this concept has been used rather broadly and for various ends in prior research (Lenz, 1981).

In prior call center research, performance is primarily viewed as an umbrella concept that, similar to what is found in broader literature, covers a wide spectrum of organizational outcomes. However, the multi-layered concept of *performance* is most often established by using certain proxies for performance (operationalized by using various performance metrics [KPIs]) for measuring outcomes of organizational activities. Although these proxies represent broken-down strategic initiatives in which performance is formalized into fulfilling principal objectives (which is ultimately targeted toward cost reduction), the link between call center proxies and explicit economic returns has rarely been examined or discussed thoroughly in prior research (Kim et al., 2005; Miciak & Desmarais, 2001).

This chapter will describe the various performance metrics utilized for establishing performance in prior call center research to further our knowledge of how to manage performance in call centers. Prior studies suggest certain separate or/and interrelated proxies for performance within



call centers, namely *service quality*, *customer satisfaction*, *sales*, and *effectiveness* (efficiency, productivity).<sup>10</sup> In this study, I will use these detailed performance metrics as the only measurement for understanding performance in call centers. This approach allows for studying performance and its antecedents in close relation to organizational operations. This is supported by the fact that most in-house call centers utilize these performance metrics to establish call center performance.<sup>11</sup> I will now introduce each performance metric.

## 2.1 Service quality

*Service quality* is recognized as one of the most important building blocks for developing and maintaining successful customer relations in an organization (Parasuraman, Zeithaml, & Berry, 1985; Svensson, 2006). Given the somewhat varying definitions, service quality is generally regarded as a construct with multidimensional meanings (Grönroos, 1990; Parasuraman et al., 1985; Svensson, 2006). For example, scholars within managerial literature refer to it as *customer-perceived quality* (true quality or quality) but also as consistent conformance to customer expectations (Crosby, 1979; Rust, Kordupleski, & Zahorik, 1993). However, this performance concept can overall emphasize an underlying focus on the quality of outcomes experienced by customers of an organization's services.

With specific regard to call center research, service quality has primarily been conceptualized as associated with a degree of excellence in how well a service is delivered by call center agents (Erez, 1990; Robinson & Morley, 2006; Singh, 2000), so it is generally regarded as a proxy for work quality (Labach, 2011). Table 1 illustrates how the performance metric of service quality is understood in prior call center research and

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<sup>10</sup> Some call center studies regard employee turnover as a proxy for organizational performance, given the emphasis on costs of recruiting new call center agents (Hausknecht & Trevor, 2011; Holman, Batt, & Holtgrewe, 2007). However, this study considers *turnover* to be an independent variable since it does not reflect actual performance achievements (so is included in the following chapter).

<sup>11</sup> Even though this approach to performance is not optimal to establish cost and revenue in relation to organizational activities, following the predominant view of performance in prior call center research will entail better prospects to thoroughly understand the context and in turn further our knowledge of how to manage performance in call centers.

categorized into the various research streams (conceptual call center research is not discussed since service quality in empirical terms is generally excluded in these studies).

**Table 1: Service quality according to prior call center research**

Stream of research	Conceptualization of service quality in terms of:	Authors
<b>Instrumental focus</b>	Length of customer wait times and work processes, error or rework rates	(Aksin et al., 2007; Gans et al., 2003; NAQC, 2010; Robinson & Morley, 2006; Stolletz & Helber, 2004)
<b>Cognitive focus</b>	Communication techniques: - <i>reliability</i> (the ability to dependably and accurately perform the promised service) - <i>accuracy</i> of information - <i>responsiveness</i> (willingness to help customers and provide prompt service) - <i>assurance</i> (the agent's knowledge and courtesy, ability to inspire trust and confidence) - <i>empathy</i> (caring and individualized attention and showing concern for customers)	(Batt & Moynihan, 2002; Biron & Bamberger, 2010; Houlihan, 2002; Jack et al., 2006; Korczynski & Ott, 2004; Labach, 2011; Parasuraman et al., 1985; Tuten & Neidermeyer, 2004)
	Service effectiveness (evaluating agents' behaviors when interacting with customers), including knowledge and competency (ability to solve problems)	(Jack et al., 2006; Liao & Chuang, 2004; NAQC, 2010; Sawyerr et al., 2009; Wallace et al., 2000)

Table 1 highlights that service quality in prior research generally emphasizes both tangible and intangible aspects of call center services that generally are established at individual and organizational levels by internal measures (Gilmore, 2001; Labach, 2011). The table also clarifies that service quality in instrumental call center research mainly is established by using efficiency-based measures (which generally disregard the actual content of customer interactions). Shortening customer wait times directly improves service quality, which is based on the underlying logic that customers are impatient (Dean & Rainnie, 2009; Stolletz & Helber, 2004). Service quality in call center studies applying a cognitive focus instead measures how well call center agents relate to customers during the interaction (communication techniques) (Bain et al., 2002) and service effectiveness, which includes the status of knowledge and competency among agents, based on how they handle various questions and problems (NAQC, 2010). This latter view of service quality performance blends quality- and efficiency-based measures and is the result of service performance (Jack et al., 2006; Sawyerr et al., 2009; Wallace et al., 2000; Winiecki, 2009).

Prior research's focus on efficiency in establishing service quality performance has been criticized as neglecting true, pure indicators of service quality in call center interactions, since this approach essentially

disregards customers' and agents' views of service quality (Bennington, Cummane, & Conn, 2000; Dean & Rainnie, 2009; Jaiswal, 2008; Miciak & Desmarais, 2001; Mulholland, 2002). Given the underdeveloped insights and superficial exploration of the essence of service delivery in this specific context, a gap in extant literature on service quality in call centers has been acknowledged (Pandey, 2014). For example, there is a need to thoroughly examine the black box linking management practice to service performance to further our understanding of how to manage and improve service quality in call centers (Batt & Moynihan, 2002; Dun, Bloemer, & Henseler, 2011; Jack et al., 2006; Redman & Mathews, 1998).

## 2.2 Customer satisfaction

*Customer satisfaction* has been broadly described to represent the first law of service (Brown & Maxwell, 2002; Larson, 1987; Moshavi & Terborg, 2002), and is a performance metric that has been interpreted somewhat differently in prior call center research. Table 2 illustrates examples of how the performance metric of customer satisfaction has been conceptualized in prior research.

**Table 2: Customer satisfaction according to prior call center research**

Conceptualization of customer satisfaction in terms of:		Authors
<b>Customer satisfaction</b>	The discrepancy between a customer's expectations and perceptions of interactions	(Moshavi & Terborg, 2002)
	Customers' level of contentment, actual customer perceptions of services	(Labach, 2011)
	A result of customer service, measured in terms of customer satisfaction	(Batt & Colvin, 2011; Jasmad et al., 2012; Labach, 2011)
	Timeliness (how fast call center agents can resolve complaints and issues) and how well they manage that (responsiveness) as main drivers of customer (dis)satisfaction	(Bennington et al., 2000)
	Concern for customers and customer service skills, such as customer focus (commitment to customers, understanding their needs, creating value, and showing friendliness, courtesy and politeness), to possess communication skills ("listening-in" skills), and be knowledgeable	(Brown & Maxwell, 2002; Houlihan, 2000; Marr & Neely, 2004; Moshavi & Terborg, 2002)

Table 2 clarifies that since customer satisfaction performance is established both from quality- (customer focus) and efficiency-based measurements (timeliness), the criteria for reaching high customer

satisfaction are similar to those required for reaching high service quality in prior research (Hekman et al., 2010; Labach, 2011). For example, it is generally understood that the faster the calls are answered and the larger number of calls closed on first contact, the higher the customer satisfaction with the call center (Feinberg et al., 2000). This greatly resembles the efficiency-based approach to service quality performance. Consequently, customer satisfaction reflects a proxy for both individual and organizational performance, which is most often established from aggregated customer responses (for the call center site versus by each individual call) (Labach, 2011).

Regarding service quality, prior studies have similarly been criticized as lacking a thorough examination of how the actual service delivery process is linked to customer satisfaction in call centers (Bennington et al., 2000; Feinberg et al., 2000; Whiting & Donthu, 2009). For example, operational measures generally used in instrumental call center studies (such as abandon rates and first-call resolution) are inappropriate indicators for establishing customer satisfaction with call center service delivery (Brown & Maxwell, 2002; Houlihan, 2000; Jack et al., 2006; Miciak & Desmarais, 2001). Other scholars have criticized this performance metric as measuring overall satisfaction of offered products and services, rather than distinct aspects of customer satisfaction in the call center setting (Feinberg et al., 2000).

## 2.3 Sales

Although prior studies highlight revenue opportunities from sales activities in call centers (described in Chapter 1.1.1), the performance metric of sales is generally measured and established from an efficiency-based approach in call center research and is a proxy for individual and organizational performance (Dimension Data, 2013; Gurvich et al., 2009). Prior studies have also highlighted sales performance from a qualitative approach, to a minor extent, most often emphasizing outcomes from possessing appropriate communication skills. Table 3 illustrates examples of how the performance metric of sales has been conceptualized in prior call center research.

**Table 3: Sales according to prior call center research**

Conceptualization of sales performance in terms of:		Authors
Sales	Cross-selling and up-selling activities when interacting with customers over the phone	(Armony & Gurvich, 2010; Downing, 2011; Gurvich et al., 2009)
	- <i>Efficiency-based approach</i> : Number of sales (such as contracts, products) during customer interactions, measured in relation to the number of calls handled by the agent, expressed as a percentage	(Downing, 2011; Jasmand et al., 2012)
	- <i>Quality-based approach</i> : Number of sales measured in relation to agents' levels of service quality (see trade-off, Chapter 1.1.1), which emphasizes communication skills required to succeed with sales in customer interactions	(Dean & Rainnie, 2009; Downing, 2011; Hutchinson, Purcell, & Kinnie, 2000; Pontes & O'Brien Kelly, 2000)

The focus on utilizing either an efficiency-based or a quality-based approach to establish sales performance not only undermines our knowledge of sales performance drivers in call centers, but also causes a lack of thorough empirical studies examining sales practices in this context (Dimension Data, 2015; Downing, 2011; Pontes & O'Brien Kelly, 2000).

## 2.4 Effectiveness: Efficiency and Productivity

*Organizational effectiveness* is generally described as the efficiency with which a business meets its objectives (Business Dictionary, 2016a). The process of measuring and actively managing organizational and employee performance to improve effectiveness is critical to the development and survival of call center organizations (den Hartog, Boselie, & Paauwe, 2004). However, given the close association with quantity, effectiveness has primarily been established by measuring the efficiency and productivity of organizational activities. Table 4 shows examples of how these two performance metrics were conceptualized in prior call center research.

**Table 4: Efficiency and productivity (effectiveness) according to prior call center research**

	<b>Conceptualization of effectiveness in terms of:</b>	<b>Authors</b>
<b>Efficiency</b>	Doing things in an optimal/fastest way, based on the understanding that goals are settled, the main resources and methods for achieving them are available. Goals are based on a quantitative view of products and services	(Erez, 1990; Røvik, 2000; Selznick, 1957)
	- <i>Internal efficiency</i> : Measuring how services are delivered and executed by primarily focusing on call center agents' actions or/and managerial actions. Example: Measuring agents' abilities to solve a customer errand or problem with as high an efficiency as possible over a set period of time by measuring the quantity of calls per hour, average call times and time between calls, according to set targets	(Armony & Gurvich, 2010; Bain et al., 2002; Jasmand et al., 2012; Koskina & Keithley, 2010; Rowe et al., 2011)
	- <i>External efficiency</i> : Studying customers' ease of reaching the call center, such as by measuring the average amount of time customers spend waiting to speak to an agent	(Rowe et al., 2011)
<b>Productivity</b>	A proxy for measuring and establishing the efficiency of a person and/or business in converting inputs into useful outputs	(Business Dictionary, 2016b; Guthrie, 2001)
	Operationalized by measuring how fast a connection has been made to a call center agent, how quickly the service request was handled and number of service requests an agent managed during a scheduled hour	(Rowe et al., 2011; Winiecki, 2009)
	Utilized in relation to sales (sales productivity), generally measured by the amount of sales per customer contact or in relation to the average amount of resolved calls per working hour (as a percentage)	(Batt, 1999; Hausknecht & Trevor, 2011)

Call center research has established *efficiency* both from an internal and external perspective. *Internal efficiency* represents a proxy for both individual and organizational performance (in which individual performance often is aggregated), whereas *external efficiency* mainly represents a proxy for organizational performance (given the emphasis on organizational support for operating with large call volumes) (Evenson, Harker, & Frei, 1999). The large emphasis on efficiency-based performance metrics in call center research is derived from the understanding in organizational studies that an organization's ability to succeed is fully determined by its efficiency (Røvik, 2000). In other words, carrying out organizational activities in the most optimal way is predominantly reflected in terms of the fastest way. This logic also applies for the performance metric of *productivity*. In fact, some call center research scholars have established productivity on the same premises as efficiency-based performance, which also reflects a proxy for both individual and organizational performance. Other scholars have made a clear distinction between efficiency- and productivity-based performance by emphasizing that the productivity level of the call center agent is the only way to measure performance in call centers (Castilla, 2005; Tuten & Neidermeyer, 2004), but did not further define the distinction. Prior research has established that improving productivity of operations in call

centers generates better cost structures and enhanced possibilities to offer customers more competitive prices, products, and services (Adria & Chowdhury, 2002; Hausknecht & Trevor, 2011).

## 2.5 Chapter summary

The review of how performance has been conceptualized in prior call center research highlights that although call centers are generally measured by these performance metrics, scholars define and understand the concept of *performance* rather differently (Akşin & Harker, 2003). The varying interpretations of how to use performance metrics (as proxies for performance) in call centers have not generated much in the way of standardized practices to establish performance in call center research. This means that researchers can use these proxies according to their own study interest. This lack of standardized measurements was especially evident when reviewing the similarities in how the performance metrics of *service quality*, *customer satisfaction*, and (in some regard) *sales* have been used in prior studies (given the focus on communication techniques and skills to establish performance within each of these three performance metrics). However, the review also highlighted similarities between how the performance metrics of *efficiency* and *productivity* have been utilized in prior call center studies (given that performance within both performance metrics was established by how fast a customer errand was solved, for example). Table 5 summarizes how performance has been conceptualized in prior call center research.

**Table 5: Summary of conceptualization of performance in prior call center research**

Proxies for performance		Conceptualized and operationalized as:
<b>Service quality</b>		Measured by; (1) how well agents relate to customers during the interaction (the effects of communication techniques); and (2) service effectiveness, which includes the status of knowledge and competency among call center agents, based on how they handle various questions and problems.
<b>Customer satisfaction</b>		Measuring the discrepancy between a customer's expectations and perceptions of the delivered service, established both from quality- (customer focus, concern, communication skills) and efficiency-based measurements (timeliness). Also considered a result of customer service.
<b>Sales</b>		Measuring cross-selling and/or up-selling activities when interacting with customers over the phone, by either using an efficiency-based (number of sales) or a qualitative approach to sales performance (communication skills).
<b>Effectiveness</b>	<b>Efficiency</b>	Establishing how fast/optimal activities can be carried out, by measuring internal (agents' and managerial actions) and/or external efficiency of call center operations (the ease for customers to reach the call center, measured in time).
	<b>Productivity</b>	Establishing efficiency in converting inputs into useful outputs by measuring either internal or external efficiency, or/and by sales productivity.





# Chapter 3 | Supposed antecedents of performance in the call center context

Since the purpose of this study is to further our knowledge of how to manage customer relations in call centers by examining performance drivers in this setting, this chapter will introduce the call center context by presenting the supposed antecedents and their relation to performance, based on prior theory. The performance metrics presented in Chapter 2, which are utilized in most call center organizations worldwide, will be proxies for performance in this chapter. The preliminary theoretical framework, based on findings in prior call center literature, is presented in the end of the chapter.

The elements highlighted in prior research can be placed into four main categories: Managerial, organizational, contextual and individual.

- 1) *Managerial elements and practices* primarily introduce how managers exercise control in call centers, which includes two main managerial practices that influence performance.
- 2) *Organizational* elements will present five main elements (of eight elements) based on how organizations are structured and designed, which prior studies show have an impact on performance in the call center setting.
- 3) *Contextual* elements include three main elements that influence performance in call centers. These elements are also antecedents of stress.
- 4) *Individual* elements include four subcategories (such as elements of motivation, capacities, and psychological resources: Stress management, personal characteristics and health, and demographic elements). Prior research has addressed 12 main elements to explain performance in the call center context.

Prior research emphasized 25 elements that influence performance in the call center setting. These antecedents and specificity of the relationship to performance will be presented in this chapter. Given that the elements largely differ regarding diversity, wealth of details and scope, they represent a rather broad explanatory model for fulfilling the purpose of this study. The wide explanatory basis is also the main reason for why a formal theory is not suitable for this particular study (see Chapter 1.3).

## 3.1 Managerial elements and practices

Based on literature reviews, the following paragraph will introduce managers in call centers and how managerial control practices are exercised. This introduction will also specify how the two managerial practices carried out in the call center setting influence performance.

### 3.1.1 Introducing managers in call centers

Call center work primarily operates with high centralization (the decision-making power is concentrated with the department heads of an organization) (Mintzberg, 1983). The dominant view in prior research is that senior management makes strategic decisions for the call center organization (Adria & Chowdhury, 2004; Armony & Gurvich, 2010). Through call centers' flat organizational hierarchy, in which roles and responsibilities are organized as a top-down process, division managers have formal authority to make decisions for the operating business (Batt, Holman, & Holtgrewe, 2009). Their main responsibility is to ensure that an organization serves its mission in an effective way, which is carried out by coordinating and allocating resources, resolving conflicts, and motivating and rewarding employees (Mintzberg, 1983). However, decisions for the operating business are generally implemented by middle managers,<sup>12</sup> who are the intermediaries between top management in the organizational hierarchy and lower levels of staff (Houlihan, 2001; Mintzberg, 1983; Wooldridge, Schmid, & Floyd, 2008). Organizational learning research and strategy literature generally acknowledge that

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<sup>12</sup> It is evident when reviewing prior call center literature that the term *middle manager* has not always been clearly separated from the *operational support function* in call center roles. However, these roles differ in terms of level of responsibility and functionality of managing call center agents.

middle managers hold a unique role, given their access to top management and knowledge of operations. This combination enables them to function as mediators between the organization's strategy and day-to-day activities (Balogun & Johnson, 2004; Nonaka, 1994). This is also applicable within call center research. For example, middle managers in call centers possess both strategic and operational roles, and have been referred to as the "key holders of insights" in the call center setting (Houlihan, 2001). Middle managers are also responsible for activities and outcomes of their subordinates and pass along performance information to higher management for ensuring that the company strategy is implemented (Butler, 2004; Mintzberg, 1983).

### **3.1.2 Managerial control practices in call centers**

*Control* can be defined as a systematic effort by management to compare performance to predetermined standards, plans, or objectives, which allows organizations to use resources in the most efficient possible way (Mockler, 1970). Control is one of the most studied topics within call center research. Given the mix of control practices exercised in call centers, it is considered "a contested terrain" (Callaghan & Thompson, 2001; Fernie & Metcalf, 1998; Holman & Fernie, 2000). The control practices in call centers generally reflect "info-normative control" (Frenkel et al., 1999), a label in line with viewing call centers as a "socio-technical system" (Callaghan & Thompson, 2001; Mandelbaum, 2004; Russell, 2008). Both labels refer to the fact that control in call centers is based on, and facilitated by, information and communication technologies which enable managers to monitor and control the work output (Armistead et al., 2002; Callaghan & Thompson, 2002).

Prior research stresses that the basic aim of various control functions is to reinforce and centralize target attainment, but also maximize efficiency and productivity of call center operations (Callaghan & Thompson, 2001; Edwards, 1979; Mandelbaum, 2004; Winiacki, 2009). Control in call centers is facilitated by the general physical architecture, also referred to as the "electronic Panopticon" (Fernie & Metcalf, 1998). This widespread metaphor stems from Foucault's adaptation of Bentham's Panopticon, which is characterized by a "conscious architectural design that enables constant surveillance and control of employees",<sup>13</sup> such as timing all types

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<sup>13</sup> The architectural design of Bentham's Panopticon (originally used by Foucault in 1977) comprises a central observation tower in a prison that is isolated. Individual inmates

of activities, including employees' toilet breaks (Ellis & Taylor, 2006; Frenkel et al., 1998; Houlihan, 2001).

### *Bureaucratic control and surveillance*

*Bureaucratic control* refers to control embedded in the organizational structure (Edwards, 1979, p. 131), created and carried out through a system of rules and standard operating procedures that shape behavior in an organization (Mintzberg, 1983). In call centers, bureaucratic control is exercised through universal displays of individual performance (such as on whiteboards in office areas) (Bain et al., 2002; Korczynski, 2005), a practice that is based on performance monitoring (also referred to as *structural control* in Callaghan and Thompson, 2001).

*Performance monitoring* refers to the observations, examinations, and recordings of employee actions and their output (Rosenthal, 2004; Stanton, 2000, p. 87), which enable both direct and indirect control of workers. Performance monitoring can help improve performance of work processes (Butler, 2004; Zuboff, 1988), which is closely related to output control (generally defined as an evaluation on the basis of standards that specify results) (Blau, 1956, p. 82). In call centers, this form of control is carried out by recording agents' calls and keystrokes, listening in on conversations with customers in real time (to facilitate on-the-spot coaching), or silently monitoring calls, which allows managers to listen in without either the agent or the customer knowing about it (Belt, Richardson, & Webster, 2002; NAQC, 2010). These control practices also relate to surveillance, which prior call center research regards as a double-edged sword, since it allows tracking performance while causing mixed implications in terms of motivating agents to perform well (Callaghan & Thompson, 2001).

Bureaucratic control in call centers has also been described in terms of using scripts, which are routinized responses of how customer interactions are to be carried out and used by all call center agents. Given that scripts regulate not just what is said, but also how it is said when interacting with customers (such as smiling, volume, and pace), whereas the latter represents a linguistic regulation (Cameron, 2000), scripts allow companies to formalize behavior for securing efficient work procedures. Call centers do this by standardizing service delivery to customers in

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could never be sure when they were being watched, since an observer in the tower could see them in their peripheral cells at any time without being seen (Ferne & Metcalf, 1998).

consistent, uniform ways (Adria & Chowdhury, 2004; Callaghan & Thompson, 2002; Houlihan, 2001; Mintzberg, 1983). For example, given that customers in prior research are generally depicted as unsatisfied, irrational, potentially unfair, occasionally angry and even abusive over the phone (Archer & Jagodzinski, 2015; Hochschild, 1983; Skarlicki et al., 2008), interacting with a “sovereign customer” requires scripts for emotion regulation (“display rules”) (Hochschild, 1983; Korczynski, 2003; Rupp et al., 2008; Sturdy, 2000; Totterdell & Holman, 2003; Witt et al., 2004).

Although scripts enable agents to carry out their work with minimal mental and psychological effort and emotional involvement with customers, scripts also are a restraining and normative control practice (Collinson, 1994; Rosenthal, 2004; Taylor & Bain, 1998). Scripts have pessimistically been addressed to provide low discretion over work, replace agents’ verbal and interactive skills, and downplay the value of analytical skills, interest and knowledge among call center agents in relation to customer interactions (Gamble, 2006; Houlihan, 2000; Wickham & Collins, 2004). Conversely, scripts are rarely completely scripted, since customer service interactions can never be entirely controlled (Rafaeli et al., 2008).

#### *Normative control in call centers*

*Normative control* refers to control through the indoctrination of norms (Mintzberg, 1983), which is also associated with behavioral control (the exercise of influence and authority over human behavior [Eisenhardt, 1985]). In prior call center studies, normative control shapes agents’ behavior and performance outcomes in predictable ways. It is practiced by middle managers through coaching, mentoring, and correcting agents in their work (Callaghan & Thompson, 2002; Frenkel et al., 1999; Russell, 2002). Given that normative control includes aiming to transform workers’ personalities and attitudes into the performance demands of the company and standardize work behaviors, normative control is also associated with creating a specific culture in call centers (Batt & Moynihan, 2002; Deery & Kinnie, 2002; Russell, 2002).

*Organizational culture*, which refers to a stable set of basic assumptions, shared beliefs and meanings that form a backdrop for action in organizations (Smircich, 1985, p. 58), is highly particular to industries and organizations (Smircich, 1983). According to prior research, the organizational culture is controlled by instilling certain values (criteria for

selecting the goals of behavior) and shaping norms (the generalized rules for governing behaviors that specify how to pursue goals [Davis, 1949]) among workers. Middle managers can shape attitudes and enable call center agents to identify with, and be ambassadors for, the call center goals through value-based training and targeted performance appraisals (the system of review and evaluation of individual or team performance [Mondy, 2014]) that emphasize the right values (Bain et al., 2002; Belt et al., 2002; Deery & Kinnie, 2002; Raz & Blank, 2007). Prior research shows that call center agents as ambassadors are critical to the performance of the entire business, given their close contact with customers (Frenkel et al., 1998; Hutchinson et al., 2000).

Prior call centers studies also highlight that managers instill norms by encouraging humor and playfulness (the locus of fun) in relation to creating a performance culture of high commitment to the team and the work (becoming a team player) (Fleming & Spicer, 2004; Fleming & Sturdy, 2011; Kinnie, Hutchinson, & Purcell, 2000). Given that managers initiate games, competitions, and awards for emphasizing certain values (Russell, 2002), a pessimistic approach views normative cultural control as a manipulation tactic for smoothing over inherent tensions in call centers and distract agents' attention away from the low discretionary work setting (Bain et al., 2002). These managerial maneuvers ("discourses of distraction" [Fleming & Sturdy, 2011, p. 178] "to smooth chaos" [Houlihan, 2001, p. 212]) also homogenize agents by provoking organizational groupthink and generating short-term solutions that rely on ad-hoc skills among call center managers (Fleming & Sturdy, 2011; Houlihan, 2001, p. 212). However, there is a great deal of difference in how agents respond to these types of normative controls (Peccei & Rosenthal, 2000) (further described in Chapter 3.4).

### *Managerial support*

Similar to many other types of organizations (Tengblad, 2012), middle managers in call centers handle many complex, interrelated issues with a specific emphasis on dealing with human relationships. In prior call center studies, *managerial support* has primarily been associated with emotional support provided by middle managers, such as encouraging and motivating agents by having an open-door policy (literally and metaphorically) (Butler, 2004). Managerial support is indirectly linked to performance (efficiency, customer satisfaction, and productivity) via an effect on their attitudes (Batt & Moynihan, 2002; de Ruyter et al., 2001;

Holman, Chissick, & Totterdell, 2002; Rowold, 2008). For example, managerial support influences agents' emotional well-being, level of commitment, and turnover intentions, by shielding them from burnout, which influences performance (Deery, Iverson, & Walsh, 2002; Singh, 2000). This relationship is found within human resource management literature addressing the fact that leadership influences organizational performance through culture and supportiveness (Ogbonna & Harris, 2000).

Other studies point at a more direct relationship between managerial support and performance. For example, having a good relationship with the middle manager is the most important element for performance since their support facilitates interactions with customers in call centers, implying a positive link to service quality and customer satisfaction (Dean & Rainnie, 2009). This is in line with studies highlighting that middle managers also provide important peer-based learning to agents by identifying training needs (Armistead et al., 2002; Frenkel et al., 1999). This has been linked to work effectiveness in organizational behavior<sup>14</sup> research (Jackson & Schuler, 1985). However, further research for examining direct and indirect performance outcomes of various managerial strategies and practices in call centers is greatly needed (Houlihan, 2002).

### *Managerial feedback*

*Managerial feedback* refers to the modification or control of a process by its results or effects (Oxford University Press, 2016b). Given that middle managers in call centers are responsible for communicating the goals of the organization, usually accompanied by constant re-interpretations to assess their relevance to agents, feedback influences performance (Arzbächer, Holtgrewe, & Kerst, 2000; Rowe et al., 2011). The predominant view in prior call center research is that managerial feedback helps agents succeed in providing sales offers and good service quality to customers (Renn & Fedor, 2001). Managerial feedback also improves agents' abilities to reach their pre-determined overall targets, specifically regarding efficiency. For example, by keeping constant track of individual- and group-based performance (with help from ICTs and statistical reports across a wide array of KPIs), middle managers can help

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<sup>14</sup> *Organizational behavior*, defined as the study of how individuals and groups act within the organizations they work (Bauer & Erdogan, 2010), includes informal activities and behavior normally hidden from the outsider in work settings (Noon et al., 2013).



agents tackle underlying tensions in call centers between providing good customer service and being efficient (Chapter 1.1.1) (Aksin et al., 2007; Callaghan & Thompson, 2001; Houlihan, 2001; Korczynski, 2003; Rowe et al., 2011).

## 3.2 Organizational elements

The following paragraph will specify five organizational elements (those driven by the organization) that prior research has shown influences performance in call centers.

### 3.2.1 Structure and work design

Prior call center literature highlights four main elements concerning structure and work design as essential drivers of performance. These elements and their impact on performance are presented in the following paragraph.

#### *Organizational structure*

The *organizational structure* (defined as the set of all the ways in which the work is divided and coordinated) that prevails in call centers generally closely conforms to Mintzberg's (1983) description of a *machine bureaucracy*.<sup>15</sup> The high functional specialization, high level of formalization (regarding rules, procedures, and tight discretion) and mechanistic structure (Mintzberg, 1983) are in line with the predominant view of call centers in prior research. This type of organization is also characterized as coordinated by process standardization (since the content of the work is specified) and output standardization (since the expected performance is specified) (Bohle et al., 2011; Mintzberg, 1983). In prior studies with a pessimistic approach, the assembly of these structural characteristics, which enable agents to handle a large number of calls per day, can cause stress, as it also entails agents to carry out repetitive, monotonous tasks at a fast pace (Chevalier et al., 2011; Taylor & Bain, 2001; Wallace et al., 2000). Chapter 3.3 presents performance implications from the organizational structure in terms of stress.

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<sup>15</sup> This specific structure has also been described to be inflexible, non-adaptive, and ill-suited for change of strategies (Mintzberg, 1983, p. 186).

### *Performance monitoring systems*

*Performance monitoring* is another structural organizational element that can influence performance in call centers. The predominant view in prior research is that performance monitoring systems generate various perceptions and reactions among call center agents that influence performance, determined by whether agents accept these systems or consider them coercive (Stanton, 2000; Taylor & Bain, 2001). The general understanding within prior research is that perceiving performance monitoring of outcomes as beneficial for agents' abilities to perform well is linked to overall higher individual performance levels (compared to agents with less acceptance of the systems) as well as higher levels of well-being (D'Cruz & Noronha, 2007; Holman et al., 2002; Sewell et al., 2011). Individual perceptions regarding these systems are also largely influenced by agents' own performance levels (D'Cruz & Noronha, 2007; Rosenthal, 2004; Sewell et al., 2011). Although the use of various IT-related systems (automatic call distribution, interactive voice response, and other computer technology integrations) enable effective calling and routing processes in call centers (Evenson et al., 1999), prior theory shows that individual perceptions still determine individual levels of efficiency in handling calls. By using similar logic, negative perceptions of surveillance were also associated with impeded levels of service quality (Brown & Maxwell, 2002; Dean & Rainnie, 2009). However, other scholars downplayed the link between agents' perceptions of control to performance by emphasizing the link to be unclear (Dean & Rainnie, 2009).

### *Decentralization*

In addition to operating with high levels of centralization (see Chapter 3.1.1), prior research also described call centers as decentralized, which refers to processes in which formal power is concentrated down in the chain of authority (Mintzberg, 1983). Decentralization seems to prevail in call centers, given that middle managers make operational decisions in their work. However, prior theory has also noted that call center agents possess certain powers to make decisions that influence their work, such as control over the duration of interactions to meet customers' demands (Adria & Chowdhury, 2002, 2004; Collin-Jacques & Smith, 2005; Thompson, van den Broek, & Callaghan, 2004). However, this notion has been contested. The dominant view among scholars is that agents have low influence over their work, both in terms of making decisions regarding their work pace and influencing the duration of actions (Bohle

et al., 2011; Grebner et al., 2003). Also, although it is implied that decentralized power might influence customer satisfaction, specific links to performance are rather limited in prior research.

The implications from this work design are also closely related to agency problems between the principal (call center/management) and call center agents, which refers to the condition in which the mutual consent of how work should be carried out and compensated (the contract) is breached (Jensen & Meckling, 1976). Agency theory rests on the understanding that the agent is delegated some decision-making authority for acting within that scope on behalf, and under control, of the principal, such as when serving customers. However, if incentives between the agent and the principal are not perfectly aligned, and information asymmetry prevails, conflicts of interest arise. This results in agents (if they are utility maximizers) not always acting in the best interests of the principal, but instead according to their own interests (Fama, 1980; Jensen & Meckling, 1976).

### *Empowerment*

*Empowerment*, which is described in call center studies as agents' level of power to take initiatives and make decisions to solve problems in their work, is generally low (Deery et al., 2002) (see above). Prior research shows mixed performance implications from empowerment in call centers, such as by highlighting decreasing levels of empowerment to generate higher levels of organizational efficiency (explained by more active managers in shortening the average hold times for the call center) and, conversely, a link between higher empowerment and higher efficiency (Schlesinger & Heskett, 1992; Schneider & Bowen, 1993). High empowerment among call center agents generates greater service quality, since increased responsibilities enable agents to further emphasize customer needs (Biron & Bamberger, 2010; Evenson et al., 1999). In addition, prior research also addresses the fact that organizations with a large number of empowered employees face lower levels of turnover, absence, and ill health (Deery et al., 2002; Evenson et al., 1999; Kinnie et al., 2000).

High empowerment is also associated with utilizing a high-involvement approach in call center organizations. This refers to a work environment comprising agents with relatively high skills and worker discretion, who prioritize service quality above operating with low costs. Given that this approach generates greater sales growth (compared to organizations

adopting a lower-involvement model), improved customer satisfaction and increased rates of problem-solving (Batt & Moynihan, 2002; Workman & Bommer, 2004), these findings highlight the importance of aligning the organizational work design and performance-management systems with the aims of the business. However, this topic is based on a broader discussion regarding alignment theory (Mintzberg, 1983; Verweire & Van Den Berghe, 2005).

### **3.2.2 Teams**

Grouping workers into teams is an established way of organizing work processes and functions in organizations (Mintzberg, 1983) such as call centers. In organizational studies, teams were assigned with the aim of making the span of control (the number of subordinates that a superior directly controls [Perrow, 1986]) effective for managers and an organizational element for securing good performance (Blackler, 1995). In prior call center research, teams mainly functioned as knowledge providers and support for colleagues. Both practices are aimed at creating collective practices and participation among colleagues in call centers.

#### *Teams as knowledge providers*

In line with organizational and management scholars who view knowledge sharing as a crucial learning practice in organizations (in which each member contributes their unique expertise to the group) (Kalling & Styhre, 2003; Stasser, Stewart, & Wittenbaum, 1995; Szulanski, 2003), teams are the central means for individuals to move along the learning curve (Yelle, 1979) and share work-related information between colleagues (Adria & Chowdhury, 2002; Geller & Bamberger, 2009; Gnaur, 2010; van den Broek et al., 2008). Knowledge-sharing practices (such as customer- and product-related information, or technology) in teams are collaboratively created and prevail in call centers, since information required for doing the job effectively is constantly shifting. Additionally, middle managers are too distanced from the actual call center work (Batt & Moynihan, 2002).

Prior theory highlights a rather uniform understanding that knowledge sharing in teams generally enhances the service quality of customer interactions and agents' problem-solving abilities in the call center context (Batt & Colvin, 2011; Batt & Moynihan, 2002; Moynihan & Batt, 2001; Mulholland, 2002). Frenkel et al. proposed an exception that knowledge

sharing in call center teams is a basic premise for service quality, rather than directly linked to it (Frenkel et al., 1998). In addition, knowledge sharing within teams positively influences sales performance in call centers (Batt, 1999; 2002; Deery et al., 2002). However, there is a lack of consensus in prior research regarding implications of knowledge-sharing practices on individual- and group-based efficiency. For example, scholars found knowledge-sharing practices between colleagues to result in lower levels of efficiency within the team. This was explained as the result of frequent help to novice agents, which impeded the knowledge providers' capacities to be efficient (Sergeant & Frenkel, 2000). These negative implications on group-based performance may also be caused by sharing knowledge (in addition to during formal team meetings) during idle, wrap-up time<sup>16</sup>, also known as informal meetings (Korczyński, 2003; Mulholland, 2004). However, these informal meetings have also been described as restricted to limited times when call volumes are reduced (Mulholland, 2002). Also in line with these findings, knowledge-sharing practices benefit productivity levels among newly hired agents, especially during initial phases of their work. More experienced agents helped them peak earlier in their learning process (Castilla, 2005). This finding relates to psychological studies and studies of informal networks, highlighting that knowledge sharing and social interaction between employees may enrich a better match between a new hire and the job (Breugh, 1981; Datcher, 1983).

Conversely, prior research has also pointed at less significant declines in efficiency from knowledge-sharing practices by downplaying the length of time workers sacrificed to share knowledge with colleagues in the call center context (Batt & Moynihan, 2002).<sup>17</sup> The mixed implications stress a further need to understand the link between knowledge sharing and performance. There is a growing interest in organizational research to examine cognitive explanations of team effectiveness (Batt & Moynihan, 2002; Brown & Duguid, 2000). Since the large majority of call center research is focused on the employee-organization relationship, prior research has also generally overlooked the fact that individual workers are

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<sup>16</sup> Wrap-up time refers to the time where the phones are switched off and the agents are unavailable to take calls. During this period, valuable information may be added to customer files to enable better service and higher revenue (Russell, 2002).

<sup>17</sup> This study was based on examining teams of two to 25 agents (with an average of 4.3 agents per team), which is far below the average number that generally exist within call center teams. This downplays the performance impact of knowledge sharing.

embedded in a range of other formal and informal relationships at work, such as teams (Bordia et al., 2010).

Taking aside the implications above, the predominant view in prior research is still that interaction and cooperation with team members is limited since call center work is individualized and agents are responsible for carrying out their own tasks (Mahesh & Kasturi, 2006). Some scholars even stress that neither teamwork nor helping behaviors exist within the call center context (Sawyer et al., 2009; Thompson et al., 2004; Townsend, 2004). Instead, performance output often takes precedence over team-building activities since agents work in isolation from their colleagues (Knights & McCabe, 1998; Korczynski, 2001; Mulholland, 2002; van den Broek, Callaghan, & Thompson, 2004). Studies show that peer surveillance prevails in teams in which agents, rather than middle managers, supervise their colleagues,<sup>18</sup> spurred by the fact that performance targets and measures generally are the same within teams (Townsend, 2004).

#### *Supportiveness in teams*

In prior call center research, *supportiveness* is mainly associated with helping colleagues in relation to emotions (such as facing difficult, unpleasant customers, or experiencing boredom, stress, or burnout). This form of social support, also described in relation to teamwork and team spirit, is not only critical for managing call center work, but has also been linked to higher service quality during calls and greater job satisfaction (Batt & Moynihan, 2002; Dean & Rainnie, 2009; Geller & Bamberger, 2009; McPhail, 2002). Given these implications, supportiveness within teams is also a means to establish loyalty to the team and its members (rather than the organization). Supportiveness can encourage workers to put more effort into reaching managerially established goals and core values (Barley & Kunda, 1992; Belt et al., 2002; van den Broek et al., 2008).

### **3.2.3 Temporary agents**

The predominant view in prior research is that (in-house) call centers generally operate with as many as one-third (29 percent to 40 percent)

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<sup>18</sup> Some organizational studies have suggested that teams have replaced the need for managerial authority (Sewell, 1998; Willmott, 1993). This notion has been discussed in terms of peer surveillance in call centers.

temporary agents, allowing for low labor costs (short training, and lower wages and benefits compared to permanent agents) (Anton & Belfiore, 2012; Holman et al., 2007; Shire et al., 2009). Temporary agents are more efficient than permanent ones on the phone, since they generally are more eager and motivated to work, and try their best to be employed on a permanent basis (Bohle et al., 2011; Chambel & Alcover, 2011; Holman et al., 2007; Rowe et al., 2011; Shire et al., 2009). Prior research also highlights that since call center work generally is considered a temporary job, rather than an entry-level position for a career, a large number of temporary agents in call centers has also been linked to higher turnover rates (Bordoloi, 2004; Chambel & Alcover, 2011). Nevertheless, temporary agents are generally also associated with higher job satisfaction and organizational commitment than permanent agents. These implications were not linked to performance (Moshavi & Terborg, 2002).

### **3.2.4 Initial training**

Organizational research defines *training* as the process by which job-related skills, knowledge, and indoctrination of organizational norms are taught and acquired (Mintzberg, 1983). This is in line with the predominant view in prior call center research regarding *initial training*. Agents undergo training when starting work in a call center, which is aimed at providing them with appropriate knowledge of the context (such as company products, systems, procedures) and customer-related (social) skills that the company requires to carry out the work (Callaghan & Thompson, 2002; Frenkel et al., 1998; Raz, 2007). On a more pessimistic note, organizational training practices in call centers have been depicted to solely aim for rapid, superficial learning to make agents perform with high efficiency, since these practices are primarily based on engaging in the company's IT systems (Houlihan, 2002).

### **3.2.5 Skills and level of knowledge**

Prior research's dominant view is that call center agents possess explicit skills (generally referred to as *codified knowledge* in knowledge management [Tsoukas, 2003]) and generalized knowledge. In management studies, this is characterized by the facilitated interaction between individuals and the limited proficiency in a specific area (Grant, 1996). Call center research considers general knowledge as a low-level



skill in many areas of work that are applicable beyond the call center (such as computer and keyboard skills, word processing, and software navigation for operating company databases). Such knowledge is primarily aimed at finding information to efficiently resolve customer issues and problems (Frenkel et al., 1999; Korczynski, 2001; Rose & Wright, 2005).

A limited number of studies emphasize that agents possess specialized knowledge. This refers to deeper-level skills that are more challenging to manage (Grant, 1996). These types of skills are associated with firm- and industry-specific skills (such as knowledge of the particular product/service, but also interpersonal, “soft” skills), which refer to a set of competencies or tacit skills related to how agents interact with customers over the phone (Grugulis, Warhurst, & Keep, 2004). These interpersonal skills include adapting to customers’ dispositions and paces, building rapport (such as confirming what the customer just said), and active listening (such as frequently including small responses, such as nodding). Prior research implies that these skills are linked to higher levels of service quality (Thompson et al., 2001). Interpersonal skills are the most important skills since customers introduce certain levels of uncertainty and variability that each agent must accommodate to effectively communicate (also because customers are routed to any available agent) (Nyberg & Mueller, 2009).

However, literature reviews also clarify that there is no consensus regarding skill trends in call centers. For example, scholars applying a more optimistic view advocate that since call center work is becoming more demanding (such as adding sales to service operations), skill demands are constantly enhanced (Collin-Jacques & Smith, 2005). According to this *up-skilling* camp, agents are recruited for their strong interpersonal skills that resemble professional employees working in a knowledge-intensive work setting (Batt, 2002; Bordoloi, 2004). Conversely, scholars within the *de-skilling* camp (a more pessimistic view) emphasize a degradation of the call center work since the standardized, scripted work and the limited discretion only requires tacit social skills (Batt & Moynihan, 2002; Callaghan & Thompson, 2001; Rose & Wright, 2005). According to this camp, all useful knowledge (such as product information, customer data, and other work-related insights) is embedded in the software (Rowold, 2007; Russell, 2002).

Moreover, call center studies with a specific interest in performance effects from possessing these skills are lacking but necessary, especially



regarding problem-solving and efficiency (Grugulis & Stoyanova, 2011; Workman & Bommer, 2004). On a related note, organizational studies' debate on skills and knowledge has been supplemented by a discussion highlighting various impacts of utilizing the right balance of specialists and generalists within a company (Pinker & Shumsky, 2000). This discussion is rather absent in call center research, although this balance is important for efficient operation.

### 3.3 Contextual elements

The following paragraph will specify the contextual elements (based on the characteristics of call centers) that prior research shows to influence performance. Although research in organizational behavior often ignores the critical role of context when examining the link between employee behaviors and organizational outcomes (Duffy et al., 2006; Johns, 2006; Morgeson et al., 2006), contextual elements are well-studied in call center research. Based on the literature review, stress in call centers is a significant element for understanding performance. This chapter will introduce three main contextual elements and their impact on performance, seen through the lens of stress.

#### 3.3.1 Antecedents of stress in call centers

*Employee stress* refers to reactions to an inability to manage a mismatch between a desired and an actual situation in the organizational life (Carver & Scheier, 2001; Cooper, 1986, p. 13). Prior call center research has similar descriptions of stress as a crucial element for understanding the drivers of performance, since workplace stress in call centers is unique (Holman, 2003a; Mahesh & Kasturi, 2006; Wegge et al., 2006). Following this theoretical understanding, contextual elements influencing performance in the call center context will be presented from this perspective.

##### *Reaching targets*

In organizational studies, *goals* are defined as the means for reaching desired ends that participants attempt to achieve by performing task activities (Scott, 2003, p. 22). However, in call center studies, goals are most often referred to as *targets*. Prior research suggests that the success

of organizations is based on measured performance outcomes within certain targeted operations. This is in line with descriptions that all operations carried out by agents and teams are targeted, measured, and evaluated (Bain et al., 2002; den Hartog et al., 2004; Mulholland, 2002; NAQC, 2010). However, rather than discussing performance impacts of operating with strictly specified, clearly defined goals, which organizational and managerial studies describe as ensuring good performance (Røvik, 2000; Schleh, 1961), the implications of targets in prior call center research mainly focused on stress (Taylor & Bain, 2001) (see exception in Rowe et al., 2011). More specifically, stress perceptions from pressures of pursuing various targets result in poor work satisfaction (Deery & Kinnie, 2004; Rose & Wright, 2005), lower well-being (Grebner et al., 2003), and impeded levels of customer satisfaction (Dean & Rainnie, 2009). However, targets' influence on performance also depends on individual abilities to deal with this stressor, which varies between agents (Ashill et al., 2009; Dean & Rainnie, 2009).

In addition, prior research criticized operating call centers by pursuing targets. Scholars emphasized that call center management appears to focus on what is easy to measure (quantitative outcomes), rather than what is important to measure (providing good customer service). The apparent pre-occupation with measurements results in a general belief among managers that the actual measures are important for call center agents, since they have become goals in their own right (Robinson & Morley, 2006).

### *Role conflict and ambiguity*

*Role conflict*, defined as incompatibilities between job-performance expectations and performance-evaluation criteria (Kahn et al., 1964; Singh, 2000), is highly related to *role ambiguity*, defined as the degree to which information is lacking about role expectations and effective performance of a role (Singh, 2000, p. 16). Given that call centers often have conflicting demands (from the main company, middle managers, and customers), both concepts are sources of organizational stress (de Ruyter et al., 2001; Jackson & Schuler, 1985; Knights & McCabe, 1998; Singh, 2000). For example, conflicting demands between managerial aims, customer expectations, and agents' emotions regarding the inherent tension between being productive versus providing high quality generate role stress. This is supported by managerial practices of emotion regulation (showing positive emotions during interactions with customers

to fulfill the work role even when feeling angry) (Singh, 2000; Zapf, 2002) (see also *coercive control* and *scripts* in Chapter 3.1.2). Prior research also addressed a conflict between customer satisfaction, sales, and efficiency in call centers. Issues and problems might vary in terms of complexity and time required to resolve them (Jasmand et al., 2012; Rafaeli et al., 2008; Witt et al., 2004). Therefore, managers in call centers encourage agents to resolve customer problems with high quality while taking many calls and being generally efficient in their work. This is in line with research highlighting that middle managers are considered a key stressor for call center agents (Taylor & Bain, 2001).

The predominant view in prior research is that role stress, generated by role conflict and ambiguity, impedes agents' abilities to perform well in the call center context. Agents' limited energy and effort must be directed toward trying to manage stressors, rather than appropriately carrying out work tasks (Tuten & Neidermeyer, 2004; Weatherly & Tansik, 1993). For example, role stress is associated with overall impaired performance levels (de Ruyter et al., 2001; Lewig & Dollard, 2003; Zapf et al., 2003) and lower levels of customer satisfaction. These implications represent dysfunctional stress (Tuten & Neidermeyer, 2004). Role stress has also been linked to reduced well-being, burnout (Singh, 2000; Totterdell & Holman, 2003; Wegge et al., 2006), and lower job satisfaction (Ashill et al., 2009), which is in line with managerial studies (Tubre & Collins, 2000).

In contrast, perceiving role stress while possessing the ability to handle stressful situations (such as by approving performance-measurement systems) generates higher levels of service quality and sales in the call center context (functional stress). However, these implications were only valid up to a point (without further specifying the exact limits of that point) (Tuten & Neidermeyer, 2004). These findings follow the logic that the absence of stress creates no motivation to perform, whereas some stress can maximize performance in call centers. Prior studies also found a link between emotional exhaustion (as a consequence of role tension) and maintained productivity levels among call center agents, even though service quality levels were significantly impeded (Singh, 2000). These findings reflect a coping mechanism for maintained performance. However, this also generated higher burnout tendencies (Singh, 2000). This finding shows that agents might maintain their productivity for a limited period of time. Given the mixed performance implications, there is

a need to further examine the relationship between individual perceptions of role stress and performance (den Hartog et al., 2004).

### *Handling time*

*Time* is defined as the measured or measurable period during which an action, process, or condition exists or continues (Merriam-Webster, 2016b). It also is a contextual element that prior call center research rarely acknowledges as a concept. Instead, it is included in discussions related to stress. The predominant view is that agents face time constraints on a daily basis, since they are pressured to include various operations during a limited amount of time in their work, but also because the call center work pace amplifies over time (Lin, Chen, & Lu, 2009; Sawyerr & Srinivas, 2007). Time constraints are mainly discussed in relation to agents' conflicting roles and performance targets. These constraints include requirements to reach efficiency-based targets, satisfy customers, and add sales into service calls. The latter conflict is generally described in terms of cross- and/or up-selling (Chapter 1.1.1). This is part of a discussion that agents perceive stress due to the nature of call center work transforming from customer service into target-centered, sales-driven operations. Although service in organizations is regarded as "a bridge to sales," since satisfied, loyal customers tend to buy more (Jones & Sasser, 1995; Reichheld, 1996), sales and service in call center organizations are instead regarded as contradictory objectives (Batt, 1999).

Prior research associates perceptions of time constraints in call centers with negative performance outcomes (Bain et al., 2002; Houlihan, 2002; van den Broek et al., 2008), such as to impeded efficiency levels. Carrying out additional tasks during a call generally results in longer customer wait times before being helped, and prolonged time handling each call, especially since agents tend to spend too much time interacting with customers to successfully balance work speed and quality (Chevalier et al., 2011; Witt et al., 2004). Furthermore, perceptions of time constraints generated lower levels of customer satisfaction due to longer handling times, but also because call center agents tended to sacrifice customer service for managing the stress associated with time pressures (Armony & Gurvich, 2010; Deery et al., 2002; Knights & McCabe, 1998). Since time in relation to customer interaction is generally limited, it is a resource that individuals must control to improve their performance (Batt, 1999; Erez, 1990). It has been suggested that call center agents should be trained in developing and utilizing better strategies for handling their time at work

(time-based strategies). Managers should engage agents in designing a break policy for themselves by specifying individual length and frequency of breaks when working. These types of time-based strategies are related to greater problem-solving efficiency and task performance (Erez, 1990; Sawyerr et al., 2009).

Prior research also described perceiving time constraints in call centers as generated by the lack of time between customer calls, breaks at work, and length of breaks (Ellis & Taylor, 2006; Norman, 2005; Taylor & Bain, 2001). Perceiving limited time to do the job also results from the psychosocial demands associated with call center work. These demands are caused by simultaneously listening and speaking to customers, inputting data into computers, and/or reading from a screen while being required to reach targets (Zapf et al., 2003). The relationship between stress and perceiving time constraints in call centers also causes psychological problems and sick leave over the long term (Norman, 2005; Rose, 2002), which might impede individuals' abilities to be productive (Sharma et al., 2011).

## 3.4 Individual elements

The following paragraph will specify the individual elements that prior theory emphasized as influencing performance in call centers. Based on the literature review, this study regards individual elements as those that concern individual perceptions of motivation, capacities and psychological resources, and personal characteristics and health. Twelve elements and their relationship to performance in the call center context will be presented in the following paragraph.

### 3.4.1 Elements of motivation

Literature reviews of call center research highlight that *motivation* is an essential driver of performance in the call center context. Motivation and its impact on performance is a topic of growing interest among scholars (Erez, 1990). The concept of motivation is included with different elements relevant for understanding the impact on performance in the call center context, which will be presented in the following paragraph.

### *Extrinsic motivation*

*Extrinsic motivation* is generally understood as an individual behavior driven by external rewards, such as material incentives. Such rewards vary across organizations (Clark & Wilson, 1961). Extrinsic motivation is also important for organizational outcomes (Zenger & Marshall, 2000). Incentives in terms of individual (such as wages and bonuses) and collective extrinsic rewards (such as collective bonuses) are often a crucial part of targets assessment and performance evaluation (Holman et al., 2007; Malhotra et al., 2007; Rowe et al., 2011). For example, extrinsic rewards generate greater efficiency at work (Rowe et al., 2011), but also higher levels of service quality and customer satisfaction (Plakoyiannaki et al., 2008).

Conversely, extrinsic rewards do not have enough compensatory mechanisms to motivate agents to perform well in the call center context, especially since the work generally only provides low pay and limited scope for promotion (Rose & Wright, 2005). For example, individual- and team-based rewards from sales competitions (such as a small amount of cash or gift vouchers) were less important than gaining recognition and status from colleagues and managers (Frenkel et al., 1998). Although scholars have addressed a need for closer investigation, a thorough examination of the relationship between extrinsic motivation and performance in the call center context is lacking (Workman & Bommer, 2004).

### *Commitment and work effort*

Organizational *commitment* is generally defined as “the willingness of the individual to give higher commitment to work” (Passarelli, 2011), which brings the individual closer to an organization, such as through its values, visions, and relationships (Plaskoff, 2003). In turn, individuals’ commitment, manifested by being willing and motivated to improve themselves, positively influences performance regarding work quantity and quality within the system established by management (Spender, 1994). However, within call center research, commitment is most often discussed in terms of work effort, which vaguely influences performance. For example, scholars described work effort as likely connected to customer perceptions of higher service quality during interactions, which may lead to increased levels of customer satisfaction (Peccei & Rosenthal, 2000; Plakoyiannaki et al., 2008; Yoon, Beatty, & Suh, 2001). Implications on efficiency have a similar vagueness. For example, work

effort likely negatively affects efficiency during high job demands, since agents' psychological effort could decrease under pressure (van Jaarsveld, Walker, & Skarlicki, 2010).

### *Goal orientation*

Research suggests that employee performance depends on *goal orientation* (Janssen & Van Yperen, 2004; Phillips & Gully, 1997). Scholars within goal-orientation theory emphasize that individuals create different cognitive frameworks for how to approach, interpret, and respond to various performance situations, based on their goal orientation. This influences their performance levels (Janssen & Van Yperen, 2004; Locke & Latham, 1990). For example, goal orientation is most often discussed in relation to agents' acceptance of working toward managerially defined goals, whereas acceptance enhances efficiency in carrying out simple work tasks (Janssen & Van Yperen, 2004). Equally important, call center studies highlighting the implications of working toward self-defined goals found that agents also placed greater emphasis on work quantity rather than quality. These results were explained by the fact that the organization's performance appraisal was weighted toward work quantity, which also highlighted managers' great power to influence agents' views of which goals and operations to consider as important when carrying out their work (Renn & Fedor, 2001). Few scholars examined the relationship between goal orientation and performance on complex tasks in call centers that require attention on both work quality and quantity (Renn & Fedor, 2001).

### *Job satisfaction*

*Job satisfaction* refers to the level of contentment a person feels regarding their work (Oxford University Press, 2016c). Prior research provided rather mixed evidence regarding the link between job satisfaction and performance in the call center context. On the one hand, there were positive links to customer satisfaction (Batt & Moynihan, 2002; de Ruyter et al., 2001; Desmarais, 2005) and individual efficiency (Mahesh & Kasturi, 2006). On the other hand, there were negative links to increased length of tenure, which resulted in reduced service levels (Pinker & Shumsky, 2000). In addition to this latter metric, job satisfaction was also linked to other broadly defined performance types, such as customer service performance (Workman, 2003) and to job performance (Silvestro, 2002). Job satisfaction is also specifically enhanced by job rotation. This finding is based on the understanding that agents who switch tasks learn



how to carry out tasks that differ from their regular ones, which reinforces their faith in their own competencies and skills that increase job satisfaction (de Ruyter et al., 2001; Pinker & Shumsky, 2000).

### **3.4.2 Capacities and psychological resources: Stress management**

Prior call center research highlights how agents in this context handle stress, elements generally understood as individual *capacities and psychological resources* (e.g., Valcour, 2007). These elements and their impact on performance are presented in the following text.

#### *Individual coping*

The concept of *coping* has been studied within many theoretical research areas, such as social psychology and stress (Folkman, 1984; Greenglass & Nash, 2008), sociology (Paulsen, 2014), and organizational behavior research (Edwards, 1988; Mikkelsen, Ogaard, & Lovrich, 2000). Although often touched on, coping is rarely defined, further problematized, or thoroughly studied in prior call center research (see examples of this in Das, Dharwadkar, & Brandes, 2008; de Cuyper et al., 2014; Houlihan, 2001; Lloyd & Payne, 2009; McPhail, 2002; Perkins, 2013; Wang et al., 2011; Witt et al., 2004; Zapf, 2002). There is a lack of consensus in prior theory on the content of coping and how to understand, define, and classify the “hundreds of forms and styles of coping” (Zhang et al., 2014). For example, coping has been referred to as “the way employees get through their working day” (Weatherly & Tansik, 1993), but also as a skill for dealing with stressful work conditions (Tuten & Neidermeyer, 2004).

Since coping is generally described in terms of successfully handling a situation (Brown, Westbrook, & Challagalla, 2005b; Chiu et al., 2005) and unsuccessful coping implies failure (Folkman, 1984), it is generally classified as a goal-oriented behavior (Latack, Kinicki, & Prussia, 1995). Other scholars understand it in terms of coping more or less effectively with a situation (Ashill et al., 2009; Svensson, 2012; Zhang et al., 2014), evaluated according to the impact on performance (Geller & Bamberger, 2009; Rameshbabu, Reddy, & Fleming, 2013; Shoss, Witt, & Vera, 2012). More specifically, coping is in prior theory mainly introduced as a tool<sup>19</sup>

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<sup>19</sup> The terminology call center and broader research uses to define coping is versatile. For example, it has been described as an *ability* (Barnes, 2005; Sharma et al., 2011),



for dealing with different kinds of frictions (challenges, pressures, problems, difficulties) that are perceived as unfavorable (Edwards, 1988) and negative (D’Cruz & Noronha, 2007; Latack et al., 1995; Perkins, 2013; Svensson, 2012; Weatherly & Tansik, 1993). For example, coping represents survival strategies<sup>20</sup> (Noon et al., 2013; Paulsen, 2014) against the demands of emotional labor (Hochschild, 1983), the pressures of the job, and the routine handling of calls (Noon et al., 2013; Taylor & Bain, 2003). The main reason why coping is related to negative outcomes stems from the fact that the majority of prior studies build on Lazarus and Folkman’s (1984) definition of coping as a stress-management tool (Folkman et al., 1986; Lazarus & Folkman, 1984). This definition originates from psychology (Barnes, 2005; Fleming, 2005b; Goussinsky, 2012; Lloyd & Payne, 2009; Sawyerr et al., 2009).

In addition, coping is often described as a subjective concept since perceptions, abilities, and experiences of coping differ between individuals, which guide informal behavior (Noon et al., 2013; Reynolds & Harris, 2006). Coping is also often regarded as a process-oriented concept (rather than a trait-based one, see exception in Ashill et al., 2009) since it emphasizes the temporal, situational, and contextual influences on coping efforts when experiencing high levels of role stress (also referred to as the *coping-behavior approach*) (Srivastava & Sager, 1999). The coping-behavior approach is closely linked to understanding coping as a learning or experience-based process. It is important for knowing how to handle stressful situations (Baranik et al., 2014; Raz, 2007; Sczesny & Stahlberg, 2000; Tuten & Neidermeyer, 2004), which coping strategies to adopt in specific situations (Houlihan, 2000; Lloyd & Payne, 2009), and how to reduce workers’ needs to cope (Goussinsky, 2012).

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*behavior* (Goussinsky, 2012), *capability* (McKee-Ryan & Harvey, 2011), *resource* (Choi, Cheong, & Feinberg, 2012; Wang et al., 2011), *effort* (Rameshbabu et al., 2013), *mechanism* (Baranik et al., 2014; Sawyerr et al., 2009), *skill* (Lloyd & Payne, 2009; Witt et al., 2004), *tactic* (Barnes, 2005), *response* (Goussinsky, 2012), *style* (Parker, Bindl, & Strauss, 2010), and *trick* (McPhail, 2002) to deal with work stress. However, the most common way to describe coping is as a *strategy* (Perkins, 2013; Svensson, 2012; Taylor & Bain, 2003). It is also generally used in terms of *manage* (Biron & Bamberger, 2010; Olofsdotter, 2012; Shoss et al., 2012; Singh, 2000; van den Broek et al., 2008; Wang et al., 2011).

<sup>20</sup> Examples of survival strategies: *Physical escape* (quitting the job, absence, or mental escape); *inward escape* (switching off) that allow employees to distance themselves from their work and the organization as a way to handle the demand of emotional labor and pressures of the job (Noon et al., 2013). Other methods include: *Ignoring/avoiding* (Weatherly & Tansik, 1993) and engaging in *positive self-instruction* (“I told myself I would get through this”) (Sczesny & Stahlberg, 2000).

It is generally acknowledged that individuals can engage in two forms of coping. *Problem-focused coping* (also referred to as *problem-solving behavior*) reflects actions for dealing with the cause of the problems by resolving it or altering the source of the stress (Harry, 2014; Lazarus & Folkman, 1984; Mikkelsen et al., 2000; Parker et al., 2010). *Emotion-focused coping* refers to actions in which individuals avoid dealing with a specific problem by instead focusing on handling or reducing the stress caused by the problem. By managing one's feelings, these actions are instead aimed at enduring the stressor (Lazarus & Folkman, 1984; Mahesh & Kasturi, 2006; Weatherly & Tansik, 1993; Witt et al., 2004). Goussinsky (2012) found that agents in call centers used various emotion-focused coping strategies, such as avoidance (behavioral disengagement), seeking emotional support, and venting negative emotions. These strategies influenced workers' well-being (Goussinsky, 2012). According to the psychoanalytical approach, individuals choose one of these two forms of coping (Edwards, 1988).<sup>21</sup>

Given that coping behaviors are based on conscious decision-making processes in which individuals exercise certain control over behaviors and outcomes (Brown et al., 2005b; Edwards, 1988; Harry, 2014; Noon et al., 2013; Srivastava & Sager, 1999), they can also create some form of control through coping (Noon et al., 2013) and even a feeling of freedom, according to prior coping theory (Latack et al., 1995; Paulsen, 2014). Control in these regards refer to the degree to which people believe they are in control of their work lives, interactions with customers, or the overall job (Biron & Bamberger, 2010; Sawyerr et al., 2009).

Although coping is an understudied concept in prior call center research, it has certain indirect or vague implications on performance in the call center context. First, coping skills are linked to service quality since an agent's emotional state (fatigue, stress, depression, and well-being) directly influences the customer and the call interaction (Deery & Kinnie, 2004; Holman, 2003a). However, certain emotion-focused coping

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<sup>21</sup> Prior studies addressed additional opposing forms of coping, such as adaptive/maladaptive coping strategies (Baranik et al., 2014; Brown et al., 2005b), dysfunctional/functional coping responses (Devi, 2012; Gnaur, 2010), and active/passive strategies (Baranik et al., 2014). This distinction is established on management requirements. Other studies addressed expressive/less expressive strategies (confronting the harasser on the phone or social isolation) (Sczesny & Stahlberg, 2000). Specific time-based coping behaviors (Ditton, 1979; Noon et al., 2013) (exploiting time by accelerating work processes) have been emphasized, but are also interpreted as a subtle form of resistance (Knights & Odih, 2002).

strategies are likely to impair the quality of service provided to customers (Goussinsky, 2012).

Second, coping abilities are also linked to higher efficiency in the call center context, vaguely explained by the fact that effective call center agents perform routine tasks differently than do ineffective ones. Effective agents are driven by higher motivation to manage their stress (Mahesh & Kasturi, 2006). Since stress is an additional task to be managed at work, it is generally assumed that individuals perform with impaired abilities when perceiving stress (Ashill et al., 2009; Harry, 2014; Tuten & Neidermeyer, 2004).

Third, coping under stressful conditions is also related to greater problem-solving abilities, also vaguely described by the fact that agents using coping strategies better use work resources to solve problems (Ashill et al., 2009). Learning how to successfully cope also results in lower depression, prevents emotional exhaustion, and greater job satisfaction and motivation, with a likely link to better work performance (Ashill et al., 2009; Baranik et al., 2014; Brown et al., 2005b; Choi et al., 2012; Houlihan, 2000). In addition, the view of coping from a managerial perspective in prior call center research is that middle managers generally do not act to enhance these abilities (Holman et al., 2002). Instead, managers play a central role in shaping and fostering agents' attitudes that help them adopt certain coping strategies in the context of limited alternatives (Houlihan, 2002; Shoss et al., 2012).

Given the under-analyzed, vague descriptions and links to performance in prior research, scholars emphasize the importance of further exploring the nuances of coping behaviors and styles at work, including the nature, diversity, and complexity of coping strategies (Brown et al., 2005b; Devi, 2012; Paulsen, 2014; Svensson, 2012). There is an increasing need not only to explore how various coping strategies actually function and operate, but also to scrutinize their implications on performance and worker behaviors. Scholars also highlight the need for insights regarding this multidimensional concept in regard to management practices and roles for agents' coping levels (Brown et al., 2005b; Goussinsky, 2012; Harry, 2014; Noon et al., 2013; Rameshbabu et al., 2013; Sawyerr et al., 2009; Srivastava & Sager, 1999; Svensson, 2012; Witt et al., 2004).

### *Collective coping*

Prior studies also highlighted a collective perspective of coping as a stress-management tool important for performance in the call center

context. More specifically, *communities of coping* is the collective practice in which call center agents turn to colleagues to seek support as a way to “get off their chests” after interacting with customers (Korczynski, 2003). This concept is closely related to *emotional labor*<sup>22</sup> (Hochschild, 1983; Houlihan, 2002) and *feeling management* (Mulholland, 2002). Prior research often highlights that this form of social support is crucial in call centers to help agents cope with the unique emotional stressors of their jobs (Korczynski & Macdonald, 2009; Lewig & Dollard, 2003) and survive tensions of the work (van den Broek et al., 2008). This finding is based on the understanding that customers primarily cause call center agents feelings of pain (such as dissatisfaction and humiliation, further described in Chapter 3.1.2) (Callaghan & Thompson, 2002; Korczynski & Macdonald, 2009).

According to prior theory, communities of coping can either be carried out in line with managerial requirements (functional communities) or against managerial directives, in which the latter most often primarily aims to weaken and undermine managerial authority (Taylor & Bain, 2003). For example, agents can cooperatively cheat an organization’s IT system to adequately perform tasks that the system does not allow (Townsend, 2004); maximize call durations to enhance customer satisfaction (Knights & McCabe, 1998; Korczynski et al., 2000); and resist managerial power and other normative control functions (Fleming, 2005c; Korczynski, 2003; Taylor & Bain, 2003). Regardless of implications, these collective actions are means to enhance control and influence over the work in call centers and realize self-defined interests (Rosenthal, 2004; Townsend, 2004). However, actual performance implications from engaging in communities of coping are vague and mostly absent in prior research. Recent research highlighted the need to scrutinize coping based on social relationships and support, and the collective impact on coping (Baranik et al., 2014, p. 4).

Since these tacit collective actions, in which agents create ways to cheat rules and control work processes, greatly resembles acts of resistance, these concepts of communities of coping and resistance are often considered synonymous in prior research.

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<sup>22</sup> Emotional labor has been defined as “the management of human feeling, during social interaction with the labor process, as shaped by the dictates of capital accumulation” (Hochschild, 1983), an increasingly recognized topic in studies of the service sector (Lewig & Dollard, 2003; Wickham & Collins, 2004).

## *Resistance*

*Resistance* is generally described as a form of opportunistic behavior (Williamson, 1975), which in call center research is often related to resisting managerial domination (Brophy, 2009; Rosenthal, 2004) or practices (Knights & McCabe, 1998; Nyberg & Mueller, 2009). Given that resistance in call centers allows agents to realize self-defined interests (Wray-Bliss, 2001) and their own benefits (Rosenthal, 2004), resistance is generally understood to represent organizational misbehavior (Barnes, 2005).<sup>23</sup> More specifically, resistance acts allow agents to take control of their work lives (Knights & McCabe, 1998) by constructing free spaces for themselves in their daily work (Rosenthal, 2004; Winiecki, 2009). This is also referred to as creating “rooms for escape”<sup>24</sup> (Ferne & Metcalf, 1998).

Prior research found that agents searched for various weaknesses in the company-controlled systems to avoid certain categories of customers and reduce their conversation rate, implying a positive relation to efficiency. This form of technical manipulation has also been used to increase break time (Callaghan & Thompson, 2001; Taylor et al., 2002). For example, call center agents utilized a strategy of pressing the transfer button at the exact right time at the end of the call to provide them with additional time to complete their clerical work. Meanwhile, the system showed that the agent was still on the call (van den Broek et al., 2008). Another example of manipulation tactics concerned *flicking*, or hanging up on customers, redirecting calls to other areas of the company or to other firms, or leaving customers waiting for lengthy periods (van den Broek, 2002). Given that knowledge of these weaknesses was informally shared (Beirne et al., 2004), resistance reflects both individual and collective behaviors (Sharma et al., 2011; Taylor & Bain, 1998), thereby resembling coping and communities of coping. These technical forms of resistance resemble Zuboff's (1988, p. 6) notion that work through technologies provides opportunities to add value, content, and meaning to workers by manipulating acts.

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<sup>23</sup> In organizational behavior research, organizational misbehavior is often defined as “anything you do at work you are not supposed to do” (Ackroyd & Thompson, 1999, p. 2), given the overall negative outcomes from these work practices.

<sup>24</sup> However, even though resistance enables certain freedom and power for agents, freedom is never really possible since they only can operate within the prevailing system and control structure (Bain & Taylor, 2000; Winiecki, 2004).

Resistance is also associated with other, more subjective stress-management tools (such as cynicism, irony, humor, and satire) toward customers, management, and managerial practices. It is generally described as “subversive satire” (Fleming, 2005a; Fleming & Spicer, 2003; Korczynski, 2003; 2011; Sewell et al., 2011). Other resisting actions are exclusively directed toward customers, such as actively sabotaging them (Skarlicki et al., 2008; Wang et al., 2011). In sum, the fact that technical manipulation and subjective resistance prevail contradicts the general picture of call centers as operating with almost total management control through cultural, bureaucratic, and technical means (Ferne & Metcalf, 1998; Taylor & Bain, 2003; 2005). Similar to coping, studies of the direct link between resistance and performance in the call center context are lacking.

### **3.4.3 Personal characteristics and health**

Prior research also addressed certain elements of *personal characteristics and health*. Findings in prior research regarding these elements and their impact on performance will be presented in the following text.

#### *Attitudes*

*Attitudes*, also known as *feelings* or *ways of thinking* that affect a person’s behavior (Merriam-Webster, 2016a) have most often been highlighted in call center studies in relation to normative and behavioral control. For example, there is a large normative emphasis in the research that agents should possess the right attitude for call center work, referring to showing positive feelings and being optimistic. These behaviors are critical for the service quality of customer interactions and customer satisfaction, especially since the dialogue between customers and agents is generally tightly scripted, routinized, and constraining (Deery & Kinnie, 2002). Positive attitudes have also been found to spur perceptions of lower levels of job stress and reduced levels of work/non-work conflicts (Tuten & Neidermeyer, 2004).

#### *Extraversion*

*Extraversion*, also called *sociability* or *confident self-expression*, has been explained in personality studies to reflect an “energetic approach to the social and material world,” characterized by assertiveness, activity, positive emotionality, and sociability (John & Srivastava, 1999). In prior

call center research, extraversion is assumed to enhance overall performance, given that call center work requires effective interpersonal interaction with various customers (Sawyers et al., 2009; Witt, 2002). However, psychological studies of personality found extraversion to also be a good predictor for sales performance (e.g., Deb, 1983), but this link has not been closely examined in prior call center research.

### *Personalization*

*Personalization*, or the ability to be personal toward customers, has been highlighted in prior research as an important psychological resource in the call center context for producing expected outcomes. According to prior theory, personalization (also referred to as a *capacity* based on interpersonal skills) is important for call center work since it mainly is practiced through talks and interactions that depend on the use of affective words (Frei & McDaniel, 1998). Being personal when carrying out customer interactions positively influences service quality, as personalization is the key to persuasiveness (Fleming & Sturdy, 2011; Sturdy & Fleming, 2003). However, further direct links to performance are generally missing in prior studies. Instead, the more personalized the conversations, the greater potential for customer satisfaction and success in the call center context (Fleming & Sturdy, 2011).

### *Well-being*

*Well-being* among individuals refers to a certain state of contentment, which includes psychological functioning and physical health (Ryan & Deci, 2001). Well-being has been studied in relation to performance in prior call center research. Lower well-being at work was linked to decreasing levels of service quality, given the increasing number of work errors (Biron & Bamberger, 2010; Schlesinger & Heskett, 1991). Other scholars found a negative relationship between call center agents' perceptions of psychological constraints to performance, but this link seems weak. Emphasizing the indirect relationship between well-being and performance in prior studies, scholars generally also stressed the strong negative relationship between well-being and emotional exhaustion. This delimits individuals' abilities to optimally manage customer relations in call centers (Holman et al., 2002; Lankshear et al., 2001; Subbarayalu, 2013).



### 3.4.4 Demographic elements

The literature review also primarily highlights one demographic element for understanding performance drivers in the call center context, which concerns individual agents' tenure.

#### *Tenure*

*Tenure* is generally described as holding a position during a length of time from starting a job to leaving it (Pinker & Shumsky, 2000). This element is also closely related to the experience of individual workers (Rowe et al., 2011). Although scholars often highlight that tenure (when compared to being hired) has a large impact on performance in call centers, there is no consensus regarding actual performance implications. For example, tenure enhances agents' abilities to be efficient at their jobs (Mahesh & Kasturi, 2006), as it provides excellent judgment of how to be efficient (Rowe et al., 2011). However, they did not find an actual impact on efficiency in the call center context. Instead, by becoming more experienced (longer tenure), agents subsequently shifted their motivation and focus from being efficient to instead enhancing their professional status and helping less experienced colleagues solve work-related problems (Frenkel et al., 1998; Rowe et al., 2011). Based on this latter notion and findings that experienced agents tended to spend longer time to wrap up customer calls, scholars also advocated tenure as a predictor of lower productivity (Batt, 2000; Castilla, 2005; Deery et al., 2002). Consequently, agents with no tenure, which is closely related to low age, often reach higher levels of efficiency than agents with longer tenure (Raz & Blank, 2007; Rowe et al., 2011).

However, prior research tends to agree that tenure implies higher levels of service quality (see exception in Pinker & Shumsky, 2000 in relation to job satisfaction), even though there are no studies emphasizing an actual impact on service quality (Raz & Blank, 2007). This performance indicator is based on the understanding that agents with no tenure have not yet had a sufficient amount of experience to know how to operate with high levels of service quality (Pinker & Shumsky, 2000), which highlights that tenured agents are more likely to possess behavioral skills required in the call center context (Higgs, 2004).

Tenure has also been linked to higher levels of emotional exhaustion (Deery et al., 2002) and decreased levels of job satisfaction (Chen et al., 2011) as a result of low opportunities for promotion and career



development due to the flat organizational structure in call centers (Deery & Kinnie, 2002; Rose & Wright, 2005). Tenure has also been associated with agents spending less effort on carrying out their work (Workman & Bommer, 2004), but also lower levels of intention to quit their jobs (Hausknecht & Trevor, 2011; Zapf et al., 2003). In line with these findings, scholars suggest that call center organizations should use an aggressive strategy to sacrifice agents with more than one year of tenure to keep overall high levels of efficiency and performance (referred to as the *sacrificial HR strategy*) (Wallace et al., 2000).<sup>25</sup>

### 3.5 A preliminary theoretical framework

This theoretical chapter has presented a total of 25 various elements that prior research has shown to influence performance in call centers. The presentation also specified each element's impact on performance in the call center context. Given that a wide range of findings from different research areas were required to establish which elements supposedly explain performance in this context, it was not suitable to use one formal theory to fulfill the purpose in this particular study. Instead, the supposed antecedents to performance presented in this chapter were generated from literature reviews of organizational studies of management and business (such as leadership and strategy research), as well as from studies of organizational behavior (all based on B2C operations). These elements were also derived from studies within service research, performance-management literature, psychological and sociological theories concerning group dynamics, and similar studies relevant for understanding how various elements influence performance in call centers. These literature reviews generated a large scope of managerial, organizational, contextual and individual elements that cover many aspects of call centers to form a preliminary theoretical framework in

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<sup>25</sup> This strategy refers to a practice of organizations deliberately paying the price of aiming for reaching both high efficiency and service by accepting high turnover rates (as a result of high stress levels and exhaustion/burnout among agents, estimated at 20 percent to 30 percent annually for in-house call centers) and costs for replacements (Batt & Colvin, 2011; Hausknecht & Trevor, 2011; Hillmer et al., 2004). This strategy should be regarded in relation to the fact that the average (in-house) call center agent, in addition to being a female that is approximately 25 to 30 years old, has less than one year of tenure (Batt et al., 2009; Holman et al., 2007; Norman, 2005).

order for this study to further our understanding of performance drivers in call centers.

A summary of the presented elements is illustrated in Table 6. These elements are also presented in Figure 1 to understand the relationship between various elements and their impact on performance, which also further highlights the dynamics between the elements, actors, and performance in call centers according to prior theory.

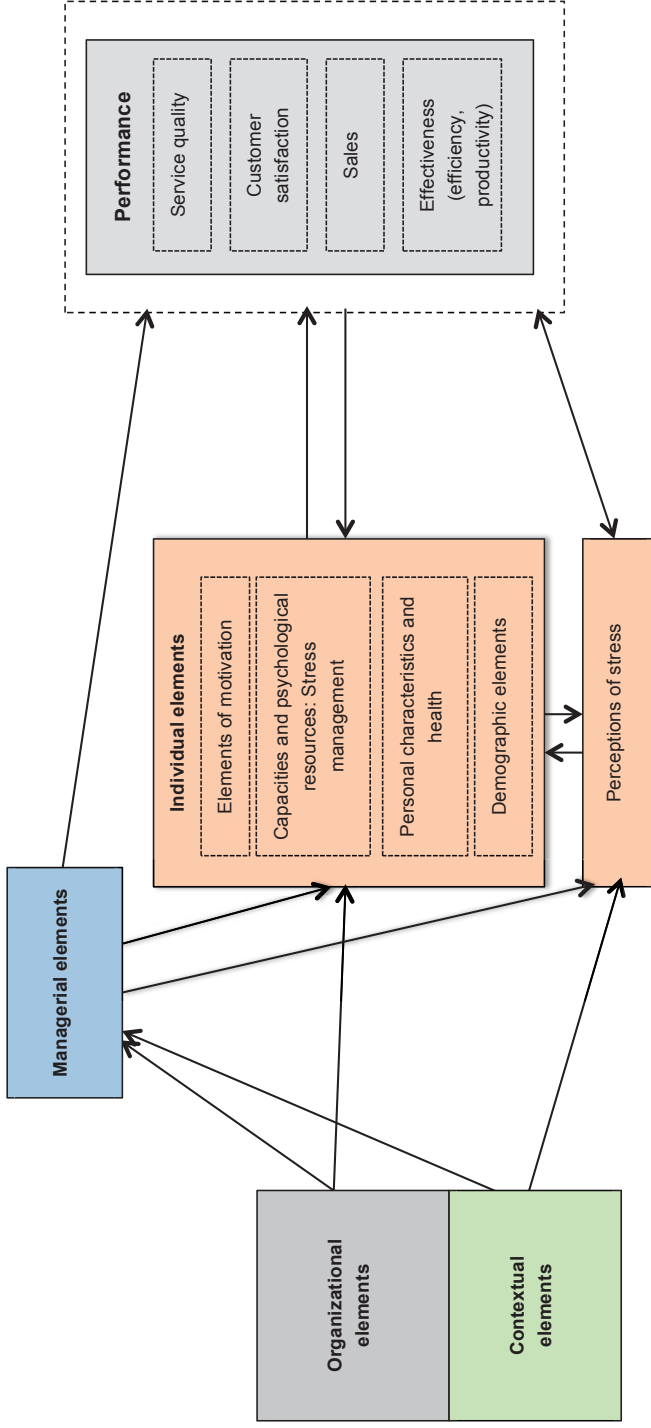
**Table 6: Elements influencing performance in prior call center studies: Preliminary theoretical framework**

Type of elements	Elements	Authors	Influence on performance
Managerial elements	Managerial support	Adria & Chowdury, 2004; Belt et al., 2002; Butler, 2004; Dean & Raimnie, 2009; Frenkel et al., 1999; Witiecki, 2009	Middle managers have positive impact on performance overall through various control practices (performance monitoring, normative control, output control)
		Batt & Moynihan, 2002; Deery et al., 2002; de Ruyter et al., 2001; Holman et al., 2002; Houlihan, 2001; Rowold, 2008; Singh, 2000	Indirect impact on performance (efficiency, customer satisfaction, productivity) via effect on attitudes
		Armistead et al., 2002; Dean & Raimnie, 2009; Frenkel et al., 1999	Direct impact on performance (service quality, customer satisfaction) through peer-based learning from middle managers
	Managerial feedback	Aksin et al., 2007; Arzbacher et al., 2000; Callaghan & Thompson, 2001, 2002; Fleming & Sturdy, 2011; Houlihan, 2001; Korczynski, 2003; Renn & Fedor, 2001; Rowe et al., 2011	Indirect impact on performance (service quality, efficiency) via shaping behaviors, exercising normative control and helping tackle underlying tensions
Organizational elements	Organizational structure	Bohle et al., 2011; Chevallier et al., 2011; Taylor & Bain, 2001; Wallace et al., 2000	Indirect influence on performance through individual elements and contextual elements (as an antecedent of stress)
	Performance monitoring systems	Brown & Maxwell, 2002; D'Cruz & Noronha, 2007; Dean & Raimnie, 2009; Holman et al., 2002; Rosenthal, 2004; Sewell et al., 2011; Stanton, 2000; Taylor & Bain, 2001	Influence on performance (service quality, efficiency) based on whether or not agents accept these systems (such as surveillance)
	Decentralization	Adria & Chowdury, 2002; 2004; Bohle et al., 2011; Collin-Jacques & Smith, 2005; Grebner et al., 2003; Thompson et al., 2004	Vague links to performance (customer satisfaction) depending on whether or not agents possess power to influence decisions in their work
	Empowerment	Schlesinger & Heskett, 1992; Schneider & Bowen, 1993	A vague or likely link to performance (efficiency)
		Biron & Bamberger, 2010; Deery et al., 2002; Evenson et al., 1999; Kinnie et al., 2000	High empowerment positively influences performance (service quality) given increased responsibilities to serve customers, as well as linked to lower levels of turnover, absence, and ill health
		Batt & Moynihan, 2002; Workman & Bommer, 2004	A high-involvement approach is linked to enhanced performance (sales, customer satisfaction, problem-solving)
	Teams	Adria & Chowdury, 2002; Batt, 1999; 2002; Batt & Colvin, 2011; Batt & Moynihan, 2002; Castilla, 2005; Deery et al., 2002; Frenkel et al., 1998; Moynihan & Batt, 2001; Mulholland, 2002	Positive influence (direct and likely) on performance (service quality, sales, productivity) based on knowledge-sharing activities within the team

		Korczyński, 2003; Mulholland, 2004; Sergeant & Frenkel, 2000	Negative impact on performance (efficiency) given that knowledge-sharing activities takes time away from solving errands
		Knights & McCabe, 1998; Korczynski, 2001; Mahesh & Kasturi, 2006; Mulholland, 2002; Sawyerr et al., 2009; Thompson et al., 2004; Townsend, 2004; van den Broek et al., 2004	Individualized tasks, no teamwork, and no cooperation trigger individual performance levels overall
		Batt & Moyinhan, 2002; Belt et al., 2002; Dean & Rainnie, 2009; Geller & Bamberger, 2009; McPhail, 2002; van den Broek et al., 2008	Emotional support within teams is linked to better performance (service quality), given greater team spirit and loyalty
	<i>Temporary agents</i>	Bohle et al., 2011; Chambel & Alcover, 2011; Holman et al., 2007; Rowe et al., 2011; Shire et al., 2009	Positively influencing performance (efficiency), given greater motivation and greater job commitment to be employed
	<i>Initial training</i>	Callaghan & Thompson, 2002; Frenkel et al., 2008; Houlihan, 2002; Raz, 2007	Initial training allows agents to quickly learn to perform efficiently with adequate social skills
	<i>Skills and level of knowledge</i>	Frenkel et al., 1999; Korczynski, 2001; Rose & Wright, 2005; Nyberg & Mueller, 2009; Thompson et al., 2001	Generalized knowledge enables agents to perform well overall, especially linked to higher efficiency
	<i>Reaching targets</i>	Ashill et al., 2009; Dean & Rainnie, 2009; Deery & Kinnie, 2004; Grebner et al., 2003; Rose & Wright, 2005	Specialized knowledge implied to enable high service levels
<b>Contextual elements</b>	<i>Role conflict and ambiguity</i>	Ashill et al., 2009; de Ruyter et al., 2001; Lewig & Dollard, 2003; Singh, 2000; Totterdell & Holman, 2003; Tuten & Neidermeyer, 2004; Wegge et al., 2006; Zapf et al., 2003	Perceiving stress from pursuing various targets is linked to impeded levels of customer satisfaction, poor work satisfaction, and lower well-being
		Tuten & Neidermeyer, 2004	Perceiving role stress from role conflict/role ambiguity (supported by emotion regulation) is associated with impaired performance levels overall, specifically customer satisfaction, and reduced job satisfaction, well-being, and burnout
		Singh, 2000	Role stress is linked to higher levels of performance (service quality, sales) up to a certain point
		Armony & Gurvich, 2010; Bain et al., 2002; Batt, 1999; Chevaller et al., 2011; Deery et al., 2002; Erez, 1990; Houlihan, 2002; Knights & McCabe, 1998; Sawyerr et al., 2009; van den Broek et al., 2008; Witt et al., 2004	Maintained productivity levels and impeded service quality from emotional exhaustion
	<i>Handling time</i>	Norman, 2005; Rose, 2002; Sharma et al., 2011	Perceiving time constraints negatively influence performance (efficiency, customer satisfaction, task performance overall)
<b>Individual elements</b>	<i>Extrinsic motivation</i>	Holman et al., 2007; Maihotra et al., 2007; Plakoyiannaki et al., 2008; Rowe et al., 2011	Perceiving time constraints has a likely negative link to performance (productivity) and strong link to sick leave
			Positively linked to performance (efficiency, service quality, customer satisfaction) through commitment to

<b>- Elements of motivation</b>			obtain extrinsic rewards
	<i>Commitment and work effort</i>	Frenkel et al., 1998; Rose & Wright, 2005 Peccet & Rosenthal, 2000; Plakoyiannaki et al., 2008; van Jaarsveld et al., 2010; Yoon et al., 2001	Low influence on performance Likely positive link to performance (service quality, customer satisfaction, efficiency)
	<i>Goal orientation</i>	Janssen & Van Yperen, 2004; Renn & Fedor, 2001	Positively influencing performance (efficiency) on simple tasks, based on accepting managerially defined goals
	<i>Job satisfaction</i>	Batt & Moynihan, 2002; de Ruyter et al., 2001; Desmarais, 2005; Mahesh & Kasturi, 2006; Silvestro, 2002; Workman, 2003 Pinker & Shumsky, 2000	Positively linked to performance (customer satisfaction, overall job performance, customer service performance)
<b>- Capacities and psychological resources: Stress management</b>	<i>Coping (individual)</i>	Ashill et al., 2009; Baranik et al., 2014; Brown et al., 2005; Choi et al., 2012; Deery & Kinnie, 2004; Goussinsky, 2012; Harry, 2014; Holman, 2003; Houlihan, 2000; Mahesh & Kasturi, 2006; Tuten & Neidermeyer, 2004	Negative influence on service levels via prolonged tenure Indirect or vague influence on performance (service quality, efficiency, problem-solving), given impaired abilities when handling stress. Abilities to cope generally positively influence performance
	<i>Coping (collective)</i>	Baranik et al., 2014; Fleming, 2005; Knights & McCabe, 1998; Korczynski, 2003; Korczynski et al., 2000; Rosenthal, 2004; Townsend, 2004	Vague or implied implications on performance (efficiency, customer satisfaction) from communities of coping
	<i>Resistance</i>	Barnes, 2005; Callaghan & Thompson, 2001; Knights & McCabe, 1998; Rosenthal, 2004; Sharma et al., 2011; Skarlicki et al., 2008; Taylor et al., 2002; van den Broek et al., 2002; 2008; Wang et al., 2011; Witnicki, 2009	Vague or implied implications on performance (efficiency, customer satisfaction) by resisting managerial practices or/and managers and their domination
	<i>Attitudes</i>	Deery & Kinnie, 2000; Tuten & Neidermeyer, 2004	A direct positive link to performance (service quality, customer satisfaction) from showing positive attitudes
<b>- Personal characteristics and health</b>	<i>Extraversion</i>	Sawyer et al., 2009; Witt, 2002	A likely link to high performance (efficiency, customer satisfaction, service quality)
	<i>Personalization</i>	Fleming & Sturdy, 2011; Frei & McDaniel, 1998; Sturdy & Fleming, 2003	A direct positive influence on service quality and a likely link to higher customer satisfaction
	<i>Well-being</i>	Biron & Bamberger, 2010; Holman et al., 2002; Lankhear et al., 2001; Schliesinger & Heskett, 1991 Mahesh & Kasturi, 2006; Rowe et al., 2011	Low well-being among agents is linked to decreasing levels of service quality
	<i>Tenure</i>	Batt, 2000; Castilla, 2005; Deery et al., 2002; Frenkel et al., 1998; Raz & Blank, 2007; Rowe et al., 2011; Workman & Bommer, 2004 Higgs, 2004; Pinker & Shumsky, 2000; Raz & Blank, 2007	Long tenure is linked to enhanced abilities to be efficient (yet a vague impact on performance) Negatively influencing efficiency (given longer wrap-up times and providing help to colleagues) and predictor of lower productivity in the long run, also related to age Implied positive link between long tenure and performance (service quality)

Figure 1: Illustration of the supposed antecedents of performance in call centers: Preliminary theoretical framework



## 3.6 Chapter summary

Guided by the research question of this study, this second theoretical chapter provided a preliminary theoretical framework, including 25 various elements that prior theory understands as antecedents to individual and organizational performance in the call center context. The preliminary theoretical framework also included findings in prior theory regarding performance (presented in Chapter 2), and, more specifically, in terms of which performance metrics are frequently used in prior research to establish performance in call centers. The following chapter (Chapter 4) will present how this rather broad explanatory model, as well as the diversity, scope, and details of the elements included in this preliminary theoretical framework will be processed to fulfill the purpose of this study.

# Chapter 4 | Research method

This chapter presents my methodological considerations, case selection, data collection, and data analysis. This is followed by a discussion on validity and reliability during the research process. The chapter ends with a reflection on the empirical result section and a chapter summary.

## 4.1 A qualitative study

I applied a qualitative, multiple-case research approach to answer the research question in the most suitable way. Given that the research question was open-ended, it demanded richness in terms of data-collection techniques and sources. A qualitative approach can capture empirical depth by using rich, detailed data when studying a phenomenon that is closely related to its context (which was addressed as a necessary research method for this type of study [Korczynski, 2003; Noon & Blyton, 1997]). A qualitative study allows for unpacking the essence of performance in a call center context. This approach is in line with scholars advocating that there is a great scope and value for carrying out qualitative research on call centers by further exploring the attributes contributing to performance (Dean, 2002). Since this allows for studying fine-grained details and emphasizing “the little things” (Flyvbjerg, 2006, p. 377) in an organizational context (such as capturing various individual perceptions and experiences of elements in relation to performance and a certain dynamism), this research strategy also allows for examining the essence of organizational behavior. The analytical depth enabled by a qualitative approach can result in a better understanding of the research issues and the inherent dynamics between elements, performance, and actors in the call center context.

Although a quantitative study captures performance causalities of a large number of elements through systematic comparisons (Bryman & Bell, 2007), this type of study only provides simplistic insights of causalities



within pre-defined questions and elements. This undermines the explorative purpose of this study. Instead, a qualitative approach reveals unexpected findings during the study process, since respondents are encouraged to expand and exemplify their responses by speaking freely. This approach is beneficial in this study, since it covered concepts that were not significant for performance based on initial literature reviews, so were not included in the preliminary theoretical framework. Instead, findings regarding elements, perceptions, performance levels, and relationships to performance were compared by using multiple subcases and collecting data through triangulation. A qualitative research design was the most appropriate method for this study.

#### **4.1.1 Abductive research approach**

This study used an abductive approach to theory and data. Both inductive and deductive features were included in the research process (Alvesson & Sköldbberg, 2009). Deductive reasoning was used for developing a theoretical framework, which established whether or not empirical findings were in line with prior research. An inductive study approach was used to reveal and explore a wide array of alternative explanations for performance drivers. The abductive research approach was especially well-suited for refining a preliminary theoretical framework by incorporating empirical observations during the research process (Dubois & Gadde, 2002).<sup>26</sup>

#### **4.1.2 Longitudinal case-study design**

In order to fulfill the purpose of this study, an embedded multiple-case design was used. Carrying out a case study allows for understanding the complexity of performance and the nature of its drivers by obtaining and emphasizing rich, detailed data in close relationship to the specific context. Active involvement in the daily routine of workers and managers, and getting close to the subjects, not only allow researchers to better understand the context in which certain actions take place (Noon & Blyton, 1997; Townsend, 2005), but also enable them to grasp underpinning values from which norms of behaviors are generated. This

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<sup>26</sup> Given the emphasis on variation in this study that requires certain sensitiveness (see examples in relation to analytical coding of data: Chapter 4.3.1.), this study is slightly more driven toward the inductive, rather than the deductive, approach.

approach enables researchers to question common-sense understandings within a context (Eisenhardt, 1989; King, Keohane, & Verba, 1994; Noon et al., 2013). This methodological choice is also associated with selecting the most suitable number of cases for conducting a study. Based on the opportunities to cover a large scope of variations in terms of performance, and its drivers and inherent dynamics, this study also explored several subcases within one company at the same hierarchical level that carry out similar tasks. This allowed me to compare manifestations and findings during the research process. Comparing findings in case studies enabled greater accuracy and trustworthiness of a study by downplaying the influence of bias upon findings (Bryman & Bell, 2007; Eisenhardt, 1989).

This study also followed a longitudinal research design. This design was beneficial for uncovering variations and dynamics within and between work groups, between agents and managers of a company, and between various elements and performance at various levels over a period of time (between 2011 and 2014). All objectives are in line with the benefits of using longitudinal multiple-case studies (Bryman & Bell, 2007, p. 60; Eisenhardt, 1989; Yin, 2009).

### **4.1.3 Case selection**

The case selection aimed to meet certain premises to fulfill the purpose of this study. The first premise was represented by the fact that the case company must operate as a call center in the service sector. This choice was bound to certain context specificity of the research (Stake, 2005). The second premise involved selecting an organization that applied and operated with a detailed, standardized system for measuring performance. Since the study aims to understand the drivers of performance on an individual- and group-based level, the organization also must systematically measure performance at both of these organizational levels to allow an intra-organizational comparison among employees carrying out similar tasks. The third premise for case selection involved access to recurring interactions with a variety of individuals (such as agents, managers) and work groups in the case organization.

I selected Eon Customer Service as my case company. Eon Customer Service is a call center organization responsible for managing customer relations of Eon Sweden. The customer relations are primarily handled by call center agents who are organized in work groups in two in-house front-offices (at different sites) with different characteristics, which provided

insights of variety within the company. Given that Eon faces low, decreasing customer satisfaction rates as a service provider, compared to the industry average (further described in Chapter 5.1.1), this case company is also suitable for understanding how it manages customer relations through their call centers. The case company also uses a well-established system for measuring individual- and group-based performance on a daily basis. This allowed for receiving individual and group-based performance data from the company's data system (this type of data has rarely been obtained in prior studies of performance in call centers; Chapter 1.2.1). Initiating a learning partnership between Lund Institute of Economic Research and the case company also allowed recurring access to company sites, call center agents, work groups, and managers, which fulfilled the third premise of this study.

## 4.2 Data collection

Triangulation, or collecting and combining complementary data, is generally beneficial for gaining a comprehensive understanding of the complexity of a phenomenon. Triangulation allows for studying a phenomenon from different views, which can uncover dynamics of independent variables influencing a particular concept (such as *performance*) in a specific context (Denzin, 1978; Eisenhardt, 1989; George & Bennett, 2005; Mahoney & Goertz, 2006). Based on the explorative research aim, the empirical data utilized in this study was collected from different sources. While interviews (with agents and managers) served as my main data point, I also triangulated this data with observations and internal documentation (such as archival data) for each subcase. Combined with the longitudinal design, this triangulation strategy allowed for a controlled comparison between the multiple embedded cases over a period of time (George & Bennett, 2005). This allowed for capturing an empirical depth, which is essential for generating reliable results (Yin, 2009).

### 4.2.1 Subcases

Multiple subcases were thoroughly studied to cover a broad scope of performance and various elements by using a case-study approach. The criteria for selecting four subcases was driven by the research question, rather than by random sampling (Eisenhardt, 1989; Yin, 2009), which was reflected in this study, as subcases were selected based on their varying performance levels. The distinct performance characteristics in the subcases over time (2011–2014) demonstrated similar and/or deviating performance trends against the average performance in the company and all work groups at Eon CS. This selection was guided by the performance evaluations utilized in the case company, which enabled me to cluster various performance metrics into three performance categories (see Chapter 4.3.1). Performance data for these subcases revealed patterns highlighting that Case Beta performed well within each of the three performance categories, whereas Case Delta showed high routine-based efficiency and high social efficiency, but lower performance within the category reflecting problem-solving efficiency. Case Gamma showed especially high performance regarding social efficiency over time, whereas Case Epsilon showed low performance levels within each of the three performance categories<sup>27</sup> (the performance data within these four subcases are further described in Chapter 6). A thorough study of these four subcases allowed me to cover a variance of performance, which was addressed to obtain a high degree of explanatory richness (George & Bennett, 2005; Ragin, 1992).

Each subcase represented work groups whose main tasks were to solve customer issues and problems. These tasks were similar for all cases. However, the subcases differed in how they were composed in terms of age, gender, education levels, knowledge and experiences, tenure, and other employment conditions among the call center agents (Appendix 1, Table 19 summarizes these features). The variety among the agents<sup>28</sup> within and between the subcases (as well as between middle managers) further enables insights valuable for furthering our knowledge of performance in call centers. This variety is beneficial for case-study research (Gerring, 2008; Gerring & Seawright, 2007).

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<sup>27</sup> Case Alpha was excluded as part of the analytical coding process (Chapter 4.3.1).

<sup>28</sup> I do not claim that the agents in the four subcases are typical compared to the general view of in-house agents in prior call center research.

## *Interviews*

Interviews were the primary data source in my research. Interviews were conducted with actors at several organizational levels, including call center agents, middle managers, and top managers (division managers for the front-office and the back-office division, and the company controller and HR managers). These interviews aimed to cover a wide scope of issues from worker and managerial perspectives in relation to the study interest and reveal dynamics within and between the organizational levels.

Following the abductive research process (Alvesson & Sköldbberg, 2009), interviews were conducted in two sets that aimed to capture an empirical depth required for fulfilling the purpose of this study. The two sets of interviews served different purposes and were based on the progress of the research process. The first set of interviews was carried out between 2011 and 2013, and aimed to gain an initial familiarity with the context, its actors, and the company's performance measures and performance-evaluation criteria. Given that these interviews were based on the preliminary theoretical framework, they also helped me gain an initial wide understanding of a range of elements and their supposed influence on performance in call centers (Appendix 2A, Interview Guide 1 shows the interview guide and the operationalization of the concepts in the preliminary theoretical framework). Table 7 shows the number of interviews carried out at the case company.

**Table 7: Interview-set 1: Statistics of the interviews in the case company (2011–2013)**

Set 1	No. of interviews	Divisions (sites)	Dates for conducting interviews	Total
Interviews with call center agents	23	Front-office (in Sollefteå): - 4 interviews in Case Beta - 3 interviews in Case Gamma - 4 interviews in Case Delta	Nov 2011, April 2012, Dec 2012	64
	19	Front-office (in Norrköping): - 3 interviews in Case Epsilon	March 2012	
	22	Back-office (in Malmö)	April 2012	
Interviews with middle managers	23	Front-office (in Sollefteå): - 4 interviews in Case Beta - 4 interviews in Case Gamma - 4 interviews in Case Delta	Jan 2011, Sept 2012, Dec 2012, Nov 2013	56
	22	Front-office (in Norrköping): - 4 interviews in Case Epsilon	Feb 2012, Sept 2012, Nov 2012, Nov 2013	
	11	Back-office (in Malmö)	Feb 2012, March 2012, Nov 2012, Dec 2013	
Informal interview/meeting with division manager (FO)	8	Front-office (meetings in Malmö)	Sept 2011, Jan 2012, April 2012, July 2012, Nov 2012, Dec 2012, June 2013, Nov 2013	8
Informal interview/meeting with division manager (BO)	5	Back-office (meetings in Malmö)	Sept 2011, Jan 2012, April 2012, Aug 2012, Nov 2012	5
Informal interview/meeting with controller	2	Front-office (meetings in Malmö)	Sept 2011, Nov 2012	2
Informal interview/meeting with HR-manager	7	Eon (meetings in Malmö and Lund)	Sept 2011, Dec 2011, Aug 2012, Nov 2012, Dec 2012, Nov 2013, Feb 2014	7
Informal interview/meeting with other top managers	1	Front-office (meeting in Sollefteå)	Nov 2013	1

A total of 143 interviews were conducted at the case company at this first set. The interviews with agents and middle managers followed a semi-structured interview guide (Bryman & Bell, 2007) with open-ended questions that allowed respondents to explain, give examples, and elaborate upon their answers. Interviews with other operational managers at Eon CS (division managers, controller, HR manager, and others in top management) were instead informal and less structured. The questions asked during these planned meetings were more adapted to what respondents wanted to discuss in relation to my research aim. However, the outline was still based on the interview guide. Each interview typically lasted between 30 and 60 minutes, took place in a quiet meeting room,

and was recorded and then manually transcribed. Notes in relation to all interview situations were also added to these transcriptions.

The interviews with the call center agents (approximately four agents per work group, in both the front- and back-office divisions) were selected based on four premises:

- 1) Daily involvement in the process/activities of interacting with a wide range of customers
- 2) Placed in a variety of work groups but carried out similar tasks
- 3) Represented various performance levels in various areas of work, according to the company's evaluation system
- 4) Together reflected a broad scope of personal features (such as tenure, age, employed/hired, and level of education)

The emphasis on variance of the selection aimed to cover a wide scope of individual perceptions and performance levels. For example, the large span of age (between 22 and 60 years) and length of tenure (a few months to 10 years) of the interviewed agents allowed for covering varying experiences and perceptions of the interview questions. Similarly, since each middle manager of the work groups differed in regard to age, length of tenure, level of education and management style, these interviews also offered a wide scope of perceptions regarding performance and its drivers. This first interview set also included a number of follow ups with managers (in italics in the table above). The follow-up interviews were carried out between 2013 and early 2014. They were aimed at keeping up to date with company actions and with actors during phases of data analysis. The number of interviews reflected the point at which an empirical saturation during this phase of research was met and where additional interviews did not provide any new information in relation to the study interest (Glaser & Strauss, 1967).

The second set of interviews aimed to test and refine initial findings and analyses by immersion in certain areas to reveal perceptions regarding the three performance categories (see below, archival data) and the supposed elements influencing performance. These interview questions were based on the outcomes of the initial data analysis, which involved exploring certain concepts from the preliminary theoretical framework in more depth, such as coping. Appendix 2B provides the guide for this set of interviews, which includes operationalization of the concepts in the preliminary theoretical framework. Table 8 shows the number of

interviews carried out with actors at the case company during this second set of interviews.

**Table 8: Interview-set 2: Statistics of the interviews in the case company (2014)**

Set 2	No. of interviews	Divisions (sites)	Dates for conducting interviews	Total
Interviews with call center agents	12	Front-office (in Sollefteå): - 4 interviews in Case Beta - 4 interviews in Case Gamma - 4 interviews in Case Delta	Nov 2014	16
	4	Front-office (in Norrköping): - 4 interviews in Case Epsilon	Nov 2014	
Interviews with middle managers	5	Front-office (in Sollefteå): - 1 interview in each case	Nov 2014	14
	5	Front-office (in Norrköping); - 1 interview in Case Epsilon	Nov 2014	
	4	Back-office (in Malmö)	Nov 2014	
Informal interview/meeting with division manager (FO)	2	Front-office (meetings in Malmö)	June 2014, Nov 2014	2
Informal interview/meeting with division manager (BO)	2	Back-office (meetings in Malmö)	June 2014, Nov 2014	2
Interview with HR manager	2	Eon (meetings in Malmö)	June 2014	2
Interview with other top managers	1	Front-office (meeting in Sollefteå)	Nov 2014	1

A total of 37 interviews were conducted in this second set. These interviews followed the same structure as the first set (semi-structured, open-ended, note-taking, and lasting 30 to 60 minutes), but included more open questions. All interviews during this set allowed respondents to organize their answers within their own frameworks and way of thinking. This interview method aimed to increase the validity of responses (Aberbach & Rockman, 2002). Transcriptions followed the same method as did the first set.

The agents for the second set of interviews were selected on the same basis as for the first set. However, these interviews were only conducted with agents working within the four subcases for this study, which were recurring. The recurring interviews allowed me to challenge earlier statements the agents made, but also to gain more in-depth insights of the reasons for these statements. The middle-manager interviews in these four cases also recurred. The number of interviews during the second set also reflected the point at which empirical saturation was met and additional



interviews would not provide any new information (Glaser & Strauss, 1967). A total of 180 interviews were conducted during my research process.

On a related note, some epistemological notions will be clarified in relation to my understanding of the interviews for this study. The empirical data from these interviews reflected expressed opinions and perceptions made by these organizational actors. Given that outside researchers generally cannot reveal intentions, beliefs or values behind human actions (Rosenberg, 2012, p. 117), I relied on the actors' understanding, knowledge, and experiences to make valid judgments and interpretations from their point of view. However, I was critical of what was said during these interviews, which entailed interpretations that guided the empirical analysis. The interviews in this study were conducted with this simple epistemology in mind.

### *Observations*

*Observations* were another essential source of qualitative data collection in my research. Observations are central when aiming to understand dynamics and behaviors within an empirical context (Bryman & Bell, 2007). In my process, the observations included getting close to the research subjects (Noon & Blyton, 1997) through direct and participant observations of daily activities. Collecting data from observations was carried out to complement data retrieved from interviews regarding performance and its antecedents in the call center context. The observations (typically lasting 1 to 2.5 hours) aimed at understanding actions (such as how agents operate in the IT systems), underlying workplace behaviors (such as routines on- and off- schedule), and interactions and dynamics in the case company. Observations also covered certain aspects of concepts in the preliminary theoretical framework better than the interviews (such as observable attitudes, well-being). Observations also allowed me to view how agents interacted with customers. Table 9 shows the total number of observations in terms of participated meetings at the case company.

**Table 9: Statistics of the observations in the case company (2012–2014/2016)**

Observations	No. of observations	Divisions (sites)	Dates for conducting interviews	Total
<b>Work group meeting: agents, operational support and middle managers</b>	12	Front-office (in Sollefteå): - 2 meetings in Case Beta - 2 meetings in Case Delta - 2 meetings in Case Gamma	6 work groups, 2 meetings per group in: April 2012, Dec 2012	<b>39</b>
	15	Front-office (in Norrköping) - 2 meetings in Case Epsilon	7 work groups, 2 meetings per group in: March 2012, Dec 2012 (1 extra in Jan 2013)	
	12	Back-office (in Malmö)	6 work groups, 2 meetings per group in: March 2012, Nov 2012	
<b>Meetings with middle managers</b>	6	Front-office (in Norrköping)	Aug 2011, Feb 2012, Sept 2012, Nov 2012, Nov 2013, Nov 2014	<b>18</b>
	6	Front-office (in Sollefteå)	Aug 2011, Jan 2012, Sept 2012, Dec 2012, Nov 2013, Nov 2014	
	6	Back-office (in Malmö)	Sept 2011, Feb 2012, Sept 2012, Nov 2012, Dec 2013, Nov 2014	
<b>Meeting with top managers</b>	6	Eon (meetings in Malmö, Norrköping, Stockholm, Ångelholm, Sollefteå and Ystad)	Aug 2011, Jan 2012, Nov 2012, Dec 2013, Nov 2014, June 2016	<b>6</b>

A total of 63 observations were conducted at the case company. Attending work-group meetings, middle-management meetings, and top-management meetings enabled me to follow agents and managers in various work-related situations. Other observations were carried out during the study:

- Listening in on calls
- Observing how tasks were carried out in the company systems
- Briefly speaking with agents before, sometimes during, and after calls about their interpretations of the call

I carried out the observations until I did not expect to gain any further insights regarding my research question (Glaser & Strauss, 1967). I took notes during and after each observation, which were included in the empirical material as background information (to add more data; see Silverman, 2006).

#### *Archival data*

Archival data was an important data-collection source for this study. This type of data provides additional valuable background and descriptive information about a company and its history (Bryman & Bell, 2007). I collected annual reports, company records, and documents of

organizational structure, performance evaluations and measurements over time, as well as protocols from meetings and consultancy reports.

However, the main source of archival data was the actual individual and (aggregated) group-based performance data derived from the company's performance-measurement systems. This data served three purposes in particular. First, broad coverage of performance data and metrics were used as proxies for performance, which allowed me to establish various levels of performance in the case company and the subcases. Second, since the performance data revealed certain variations over time, it also allowed me to track the agents and work groups that achieved various levels of performance within different areas of call center work (beneficial for the interviews). Third, the data also revealed certain performance patterns by detailing each KPI and gaining a thorough understanding of how these measures were used and evaluated. These patterns enabled me to cluster performance metrics into three performance categories (the analytical coding process is presented in Chapter 4.3.1), which were utilized to analyze the empirical data. In addition, the features of the three performance categories also allowed me to analyze the inherent challenges within and between each category (such as variance in control, trade-offs, and various use of skills and capacities).

The collected archival data analysis was ongoing during the research process. This was done in relation to the analysis of data collected from interviews and observations, which aimed to ensure that the understanding of the performance measures and performance data would not be challenged by new information (Glaser & Strauss, 1967).

#### *Summary of data collection*

Table 10 briefly summarizes the data sources and also highlights what each of these sources of data provided in relation to the research question.

**Table 10: Summary of the purpose of each data-collection method**

Source of data	Method for collection	Purpose in relation to the research question
<b>Interviews</b>	<ul style="list-style-type: none"> <li>• Semi-structured interviews with open-ended questions with agents and middle managers, conducted in 2 sets</li> <li>• Non/semi-structured interviews/meetings with other company managers, conducted in 2 sets</li> </ul>	<ul style="list-style-type: none"> <li>- Set 1: Exploring a wide scope of views of potential elements influencing performance in call centers</li> <li>- Set 2: Testing and refining initial analysis of the drivers of performance in a call center setting based on further findings from 4 subcases (which generated 4 types of elements that explain performance). Interviews provided a thorough understanding of elements and their character, the essence of the link between elements and performance in a call center setting.</li> </ul>
<b>Observations</b>	Direct and participant observations of: <ul style="list-style-type: none"> <li>• Daily activities and behaviors at work, on- and off-schedule</li> <li>• Work-group meetings</li> <li>• Managerial meetings</li> </ul>	Provided additional insights regarding: <ul style="list-style-type: none"> <li>- Impact of the work setting</li> <li>- Dynamics and interactions between organizational actors</li> <li>- Workplace behaviors (in real time)</li> </ul> Observations entailed an in-depth understanding of the character of elements influencing performance and as a complement to interviews regarding the link between elements and performance in a call center setting.
<b>Archival data</b>	<ul style="list-style-type: none"> <li>• Collecting reports, documents and records</li> <li>• Collecting data from company performance-measurement system</li> </ul>	For a thorough understanding of performance in a call center setting. <ul style="list-style-type: none"> <li>- Provided proxies for establish areas and patterns of performance, which generated 3 performance categories</li> <li>- Provided insights of challenges between categories and areas of performance over time</li> <li>- Provided a selection and in-depth study of 4 subcases with different performance levels over time for covering a wide scope of individual- and group-based performance.</li> </ul>

### 4.3 Data analysis

The analytical approach utilized for this study is based upon Yin’s (2009) pattern-matching strategy. This strategy is particularly beneficial when utilizing various methods for collecting qualitative data, since it allows going back and forth between a range of detailed data (such as from several actors and over time) and various concepts (such as antecedents and performance). This study also iterated between theory and data, and described what was empirically known and what was learned from additional empirical studies, as an analytical approach (Bennett & Checkel, 2012; Brady & Collier, 2010). The entire research process iterated between: Notes and transcripts of interviews and observations; empirical findings (performance categories and elements that drive performance in these categories); and the preliminary theoretical

framework. This analytical process provided opportunities for elaborating on discrepancies between theory and empirical data, and enabled a detailed comparison between performance metrics utilized in the case company and those in prior studies. The combination of pattern-matching and iterations was important for staying as true to the data as possible during the research process (Lakatos, 1970) and revealing novel findings.

### **4.3.1 Coding the empirical data**

All empirical data was analytically coded. This coding process was represented by taking apart segments of data to allow the complexity of the entire scope of data “to speak” (Bryman & Bell, 2007). Two separate analytical coding processes were carried out. One process (A) was based on coding the qualitative data from interviews and observations, whereas the other process (B) coded archival data. However, both processes were pragmatic methodological schemes for comparatively analyzing data between cases at the micro-level. Both schemes are beneficial for understanding a phenomenon at the aggregated organizational level (Lieberman, 2005). Both analytical coding processes also leaned on my analytical judgment to establish when saturation was met, both between empirical data and between empirical data and theory (Eisenhardt, 1989; Glaser & Strauss, 1967). The following paragraphs describe how I carried out the two analytical coding processes.

#### *Analytical coding process (A): Coding the qualitative data*

Table 11 illustrates that the qualitative data was coded in three main stages.

Table 11: Illustration of the analytical coding process of qualitative data

Coding stages	Aim	Content	Output	Examples	Carried out
Stage 1	Open coding process (raising raw data to a conceptual level)	Iteratively categorized all quotes from interviews, group meetings and notes from interview set 1 and initial observations into themes by: a) merging data sources into an Excel spreadsheet b) initial coding of data material	Generated 365 codes	"We have a lot of statistics. It's a good thing because then I can follow how I perform" (Agent, Case Beta, April 2012). → codes: <i>absorbing control, work tools, statistics, attitude toward work</i>  "Sometimes I just want to talk calories instead of kW, but I feel a bit stuck since I live in the north and there are no other job opportunities" (Agent, Case Gamma, April 2012). → codes: <i>location of the call center, attitude toward work, development, job satisfaction</i>	Autumn 2012
Stage 2	Creating second-order coding families for a broad knowledge of the detailed data.	Interpretatively establishing key concepts of the study generated from the large number of codes. Established after follow-up interviews.	Generated 40 second-order coding families	"One's perceptions of the level of surveillance at work has a lot to do with the manager you have" (Agent, Case Epsilon, March 2012). → Interpretatively coded as the coding family of <i>managerial control</i>  "What would make me feel better is a quiet room...a quiet work environment is a utopia within customer service" (Agent, Case Gamma, April 2012). → Interpretatively coded as the coding family of <i>perceptions of physical environment and well-being</i>	Autumn 2012–mid 2013
Stage 3	Categorizing recurrent themes, categories and patterns	Identifying main elements influencing performance and their relation to the three performance categories, or theorizing the drivers of performance. Empirical presentation following the performance categories.  Identifying core elements influencing performance (individual and interpersonal elements) and their relation to the 3 performance categories again after interview set 2 and accompanying observations. Empirical presentation now instead following the elements.	Generated 10 coding families  Generated 4 coding families	"I think that if I would be given better pay, my performance level would rise. It feels pointless to constantly outperform when it doesn't give any dividends, despite I'm keen to do it" (Agent, Case Beta, 2013). → Categorized as the element of <i>Appropriate levels of material rewards</i>  "You don't see the same effort among those who have worked her for a long time and [that] don't find it as fun as these younger ones coming from Manpower" (Middle manager, Case Gamma, Nov 2013). → Categorized as the element of <i>Tenure</i>  Representing the 4 elements described in the empirical findings 1) The individual element of <i>copying</i> - The three interpersonal elements: 2) The <i>contextual elements</i> 3) The <i>control-based elements</i> 4) The <i>cultural elements</i> (All described in Chapter 7)	Autumn 2013  Spring 2015

The first stage of this coding process was an open-coding process aimed at raising the “raw data to a conceptual level” (Charmaz, 2006; Corbin & Strauss, 2008) and gaining an initial understanding of the wide scope of elements influencing performance in the case company. This process was carried out by categorizing quotes from all interviews (in set 1) and notes from group meetings and observations (during the same time period) into themes. This was an iterative process between the data and the preliminary theoretical framework. This process generated 365 codes on a cross-case basis, since the codes were based on data from actors within all work groups at Eon CS at that time.

The second stage of this coding process was aimed at keeping a clear link between the details of the rich data, the theoretical point of departure, and the initial empirical findings, while aggregating the 365 codes into second-order coding families. By interpretatively establishing key concepts of the study (from patterns of recurring answers and notes) and creating a broader picture of the data, this stage of coding eventually resulted in 40 coding families.

Finally, the third stage of coding aimed to create a comprehensive picture of recurrent themes and categories in the empirical data. Becoming intimately familiar with each case (Eisenhardt, 1989) and including archival data (triangulating the analysis) eventually resulted in 10 coding families. These families (representing the main elements influencing performance in this context) were first presented according to the performance category they influenced. This presentation primarily highlighted the outcomes rather than the actual elements (to avoid repeating descriptions of their impact). However, these findings were further refined after conducting the second set of interviews and making additional observations. This was done because the findings aimed to test the initial analysis, and the validity of the 10 coding families and their relation to performance. By iterating between additional collected data of the 10 coding families and additional organizational theory to gain a better theoretical understanding of the findings, this analytical process provided a more thorough understanding of my research question. The 10 initial coding families were refined into four coding families by testing, refining, and further analyzing the findings. These four coding families, which I refer to as *elements* in this study, are further presented in relation to their impact upon the three performance categories in Chapter 7.

This three-stage coding process provided a detailed comparison between raw qualitative data and aggregated categories. The analytical coding process of the qualitative data not only facilitated a novel interpretation of empirical data (Alvesson & Sköldbberg, 2009), but also gave a broad overview of the context (Miles & Huberman, 1994) and revealed the complexities in how to manage performance in a call center context.

*Analytical coding process (B): Coding the archival data*

During the research process, collected archival data (Chapter 4.2.1) provided hints of how performance was conceptualized, defined, measured, and evaluated at Eon CS. These hints were crucial, given that I used actual performance data (derived from company databases) to establish individual- and group-based performance at Eon CS (subjective performance metrics were excluded from this study; see Table 22 in Appendix 3). To make sense of the rich, detailed, performance data while relating it to theory, an analytical coding process of archival data (such as performance metrics and actual performance data) was carried out.

The analytical coding process of the archival data was carried out in three steps. During the first step, I aggregated the individual performance data into the group level for each work group (14 in total) at Eon CS (both company sites) to establish performance levels of each work group while keeping a certain richness of the performance features at the group level. The aggregated performance within each work group and metric was then arranged according to the performance outcome for three years (2011–2013), which was also compared against the average performance in the company.<sup>29</sup>

This second step of the coding process clearly shows that the work groups (as an average of all agents included in each group) generally performed equally within certain metrics (compared to other groups and the company average) and over time, although some differences were found within the groups at the individual level (Chapter 6.3.1).

These patterns at the group level over time enabled me to cluster various performance metrics into three different performance categories for the third step of this coding process. The performance categories generated from this step represented various types of performance: Routine-based

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<sup>29</sup> Agents' performance data from 2011–2013 was the primary data for the performance categories. However, performance data from 2014 was later compared to this data set, which overall aligned with this data material.



efficiency (performance category A); social efficiency (performance category B); and problem-solving efficiency (performance category C). These performance categories were further established while conducting this study (Chapter 4.2.1, interview set 2). This analytical categorization of performance metrics that are regularly and systematically measured at Eon CS at the individual and group levels, and the labels used for each category, reflect my analytical interpretation and theoretical understanding of performance.<sup>30</sup> The performance categories generated by this analytical coding process will be used when analyzing the empirical data of this study (Chapter 8).

## 4.4 Reliability and validity

Clarifications of how reliability and validity were met and acted upon during the phases of data collection and analysis must be emphasized to establish the quality of the research. Table 12 summarizes the tactics in this study for ensuring reliability and validity, which is based upon Yin's (1994) criteria for judging the quality of research designs (Yin, 2009, p. 41).

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<sup>30</sup> Details regarding these three performance categories (such as which type of performance they reflect and trends) are further described in Chapter 6.2.

**Table 12: Tactics for ensuring the quality of the research design**

Test	Case-study tactics	Tactics in my study
Reliability	Using a case-study protocol	Establishing procedures and a plan for how to progress and carry out the study in a consistent manner. For example, conducting interviews in a consistent manner to assure that respondents perceive the questions similarly.
	Develop a case-study database	Raw data (performance data, transcripts, notes) organized and documented in files in chronological order, according to the date it was collected. Documents, including analytical descriptions and progressive findings, were separated from the raw data.
Construct validity	Using multiple sources of evidence	Collecting data from interviews with agents and managers at several organizational levels, and from observations and archival data: using triangulation.
	Establish chain of evidence	Followed the same procedures when collecting data during the study: Generating questions to interview guide based on theoretical framework, using citations (incl. dates and location) in empirical presentation from transcripts, analyzing data in relation to the studied concept/element.
	Have key informants review draft case-study reports	Reporting back to managers at Eon CS. Carrying out 2 sets of interviews for test and refinement of initial analysis with agents and management by using a longitudinal approach.
Internal validity	Do pattern-matching	Analyzed by pattern-matching and iterating between notes and transcripts of interviews and observations; empirical findings; and the preliminary theoretical framework for finding out discrepancies between preliminary theoretical framework and empirical data. Analytical coding of data to establish patterns of causal relationships.
	Taking other explanations into account	Testing and refining the initial analysis of the link between elements and performance during a second interview set, providing insights regarding alternative explanations which are taken into account during further analysis.
External validity/generalization	Use replication logic in multiple-case studies	Using 4 subcases at the case company for comparing findings that can be replicated in studies of the same type of call center setting. Also analytically generalizable to broader theory of organizational and workplace behavior.

The reliability of qualitative research foremost concerns evaluating the trustworthiness of a study (Silverman, 1993), such as whether or not a thorough and systematic documentation of the research process can be presented (Yin, 2009). Several actions were taken during the research process to ensure high reliability of this study. For example, all interviews and observations in the case company were planned, recorded, and transcribed in a consistent manner. The interviews also followed pre-defined guides for assuring that all respondents were given similar opportunities to provide answers. The observations and informal talks with the organizational actors were also documented by taking notes (including thoughts and details of the situations) that were summarized and included into the empirical findings. The empirical material was also organized according to the date it was collected to trace all type of

documentation back to the original data source. These actions meet Silverman's (2006) criteria for high reliability.

Other actions are required to ensure a high level of study validity, which is generally concerned with the extent to which a study's operational measurements for studying concepts really carries out this function (Silverman, 2006). To raise the level of integrity of the generated conclusions (Bryman & Bell, 2007), which is determined by the research's construct validity, I aimed to identify correct operational measures for the concepts being studied (Yin, 2009) by using multiple sources of data. Collecting a large amount of rich, detailed data from several organizational levels through triangulation enabled me to establish a chain of evidence. Collecting various types of data enabled more valid, clear definitions of performance and the elements influencing it in a call center context. Applying a longitudinal approach in which opinions of both agents and managers were utilized to refine concepts, and theoretical and empirical findings during the research process, increased the validity of the research. These opinions were collected during interviews (from the responses to open-ended questions) and meetings in which I reported back to the groups and management at Eon CS. Since these opinions helped me re-interpret and validate initial findings that allowed for scientific rigor, these actions meet the criteria for ensuring validity of responses used in the research (Aberbach & Rockman, 2002).

Moreover, an iterative analysis and a pattern-matching strategy between notes/transcripts, empirical findings and preliminary theoretical framework was used to strengthen the internal validity of this study. This strategy was carried out with a particular sensitivity to details (immersing in empirical details) by using literature to construct and make sense of the rich empirical descriptions, rather than using a formal theory. These analytical approaches helped establish causal relationships between elements and performance and the essence of those relationships, and find discrepancies between the preliminary theoretical framework and empirical data, which is required for realizing novel findings. The analytical coding of qualitative data also enabled me to refine various elements to higher levels of aggregation (George & Bennett, 2005). In addition, some alternative explanations to my initial findings were also taken into account, which were approached during the second set of interviews and subsequent analysis.

Finally, I selected four embedded cases for comparison and replication to strengthen the external validity of this study. The multiple cases (subcases) more specifically enabled an analytical generalization of the findings from this study (Bryman & Bell, 2007; Yin, 2009), while conducting an exploratory, explanatory research approach to further our knowledge of how to manage performance in a call center context. The analysis of “context-bound typicalities” (Halkier, 2011) and other tendencies in relation to prior theory could have certain explanatory power for furthering our knowledge of performance in other contexts and situations (Bennett & Braumoeller, 2010).

## 4.5 Empirical presentation

Since the aim of this research is to further our knowledge of how to manage performance in a call center context, this study will benefit from structuring the empirical material to enable a comprehensive, detailed, novel understanding of performance and the elements that influence it in call centers. Given these premises, the empirical data of this study is presented and structured according to the empirical findings (the four elements; see Chapter 7) derived from interviews and observations in the four selected subcases. The performance implications are presented under each of these elements.

Presenting the empirical data by these analytically derived elements is the most suitable structure for this study based upon the following:

- 1) The large amount of complex, richly detailed data requires presentation in close relation to the operations in the case company. This structure enables a clear understanding of the actions and operations in relation to performance in the case company. These descriptions would be vague if they followed a chronological outline, since the number of subcases would make the presentation too complex to understand.
- 2) Certain elements were more important than was highlighted in prior theory and demonstrated in the preliminary theoretical framework. Therefore, after being tested and refined from further analysis of the qualitative data, the empirical data was structured according to analytical concepts, rather than by strictly following

the theoretical framework. The selected structure better reflects the findings of this study.

- 3) Primarily highlighting the analytically derived elements, rather than the performance impacts (in which impacts are presented under each element instead of the opposite), allows for acknowledging details within each element. Following the rich data material realized by this structure not only clarifies the importance of certain concepts in relation to prior theory, but also highlights the full scope of performance impacts within each element. Structuring the empirical presentation according to the performance categories would limit the data, which would undermine understanding of the large picture and the dynamics between the four elements.

Based on the shortcomings of alternative structures, the most suitable way to fulfill this study's aim is to structure the empirical data according to analytical categories to offer a more distinct, novel understanding of the essential concepts for performance in call centers. However, before presenting the empirical data (Chapter 7), the upcoming two empirical chapters will introduce the case company and company background features (Chapter 5) and describe how performance was conceptualized at Eon CS (Chapter 6).

## 4.6 Chapter summary

This chapter outlined the reasoning behind the selection of research strategy for this study (qualitative study, abductive research approach, longitudinal case-study design, and case selection), choices regarding data collection (collecting data from interviews, observations, and archival data in four subcases), and selecting the most suitable analytical approach for fulfilling the purpose of this study (pattern-matching, iteration, and analytical coding of qualitative and archival data). This chapter also clarified how validity and reliability were met and acted upon to establish the quality of the research. This was followed by a presentation of reasons for structuring the empirical presentation according to analytical categories.

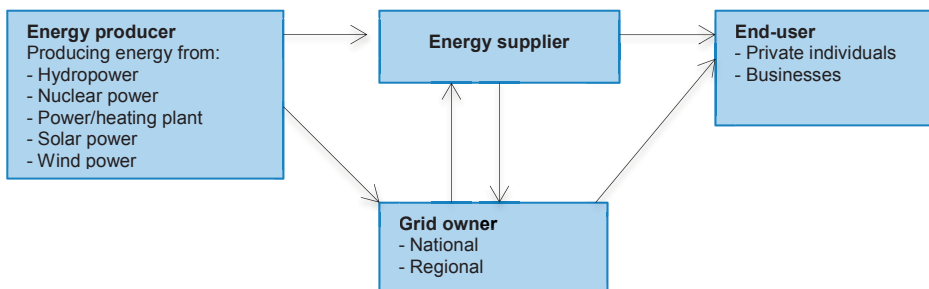
# Chapter 5 | Setting the stage: The case context

To set the context of the empirical study, this chapter will elaborate on the specific characteristics of the case company, which represents a particular kind of call center organization. The chapter will briefly present the industry within which the case company operates, followed by a basic introduction of the case company and its organizational structure. This chapter will also include a description of the actors upon whom this study will focus, along with their tasks. This will be followed by describing a representative example of how a general working day at Eon CS may look like.

## 5.1 The Swedish energy industry

Eon is operating within the Swedish energy industry (in the utilities sector). The *energy industry* refers to the operations carried out between actors involved in the production, supply, and consumption of electricity (Figure 2), which is a dynamic, growing industry with volatile energy prices (Wall & Magnell, 2014).

Figure 2: The Swedish energy industry



The energy industry comprises four actors. *Producers* are responsible for producing energy that occurs in different types of power plants (hydropower, nuclear power, and wind power). Producing energy was a monopolized business in Sweden until 1996, when market liberalization entailed new rules for the industry. Trade and production of electricity then opened up for competition (Broberg et al., 2014). The market liberalization was aimed at creating competition in electricity supply for establishing market pricing that also increased the ability of end-users to freely choose any electricity supplier (Eklund, 2012). *Energy suppliers* purchase electricity directly from the producers and own a supply contract with end-users. Only half the number of electricity suppliers survived the market deregulation (Brodin et al., 2013; EI et al., 2007). A *grid owner* owns the electric wires that connect the production and consumption facilities. The grid owner distributes the actual electricity between the electricity producers and end-users via regional and local grids through the energy suppliers. Power-grid operations in Sweden are a regulated monopoly (Eklund, 2012; Fridström, 2013; Svensk Energi, 2013). Finally, *end-users* (the buyers of the energy; private individuals and businesses) consume electricity by having an agreement with both the grid owner and an energy supplier (Bergman, 2014).

The Swedish energy industry currently consists of three major operators (Vattenfall, Eon, and Fortum) and a large number of smaller companies that supply energy to the Nordic countries (EI et al., 2007; Eklund, 2012; Svensk Energi, 2014). The conditions for the three firms are rather similar in terms of ownership and areas within which they operate since they (jointly) own the power plants,<sup>31</sup> and are producers, grid owners and suppliers of electricity (Bergman, 2014; E.ON Sverige, 2010).

### **5.1.1 Managing customer relations**

The competitive business landscape in the energy industry increases the demands on companies to meet customer needs, such as by customizing agreements and products, and improving customer service (EI, 2006; Lennebo, 2012). Since the energy industry is still evolving (Broberg et al., 2014), operating in this industry also require firms to keep up with changes by preparing and adapting to changes to attract new customers

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<sup>31</sup> The three firms represent 75 percent of all energy production in Sweden (Bergman, 2014).

but also retaining current ones. Despite the fact that Eon's (Sweden) CEO characterizes its business as furthering development of "energy solutions with the customer in focus" (E.ON Sverige, 2014, pp. 3–5), customers still expect something different from Eon's customer service strategy. Recurring media stories regarding their SQI<sup>32</sup> and NPS measurements<sup>33</sup> highlight the fact that Eon faces customer satisfaction ratings lower than the majority of companies in the industry and below the industry average (Kvalitetsindex, 2014). This trend is contrary to the opinions of the overall industry. While there has been a tendency of increasing satisfaction with the energy industry over time (Kvalitetsindex, 2014; 2015), customers' perceptions of Eon have been rather low and fluctuating.

Eon's low customer satisfaction ratings primarily come from its private individual customers (Isacson, 2012; Ramqvist, 2011; SvD Näringsliv, 2013; Kvalitetsindex, 2014; 2015). The low satisfaction ratings derive from unmet expectations regarding service and perceptions of low value for money (high prices) (Axelsson et al., 2007). The size of the company hampers its ability to accommodate customers' preferences (SKI, 2014), such as low availability and little contact with customers, apart from customer-initiated contact regarding complaints or/and power outages. These service-based shortcomings, in addition to unclear invoices, and insufficient information, and compensation for damage related to power outages contribute to low satisfaction among Eon's customers (Larsson, 2015; SvD Näringsliv, 2013; Kvalitetsindex, 2014). Given that the company loses more than an average of 10 percent of their customers each year (Eon.se, 2013), Eon's current strategy for handling and managing relations with private individual customers appears to be misaligned with customers' service expectations and preferences.

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<sup>32</sup> Swedish Quality Index (SKI) provides data based on measurements and analyses of customer responses of their satisfaction with products and services, which also includes the energy industry (Kvalitetsindex, 2013).

<sup>33</sup> Information received from NPS Coordinator, Business Management Unit, in April 2015. See further information of NPS in Appendix 3, Table 22. Since 2013, Eon received a higher NPS rating in relation to both Vattenfall and Fortum, but lower ratings than other energy companies, such as Skellefteå Kraft and Telge Energi; rates compared January–March, 2015.



## 5.2 Eon Customer Support (Eon CS)

Eon Sweden AB (Eon) is an integrated, wholly owned subsidiary of the Eon Group (in Dusseldorf, Germany), which is one of the world's largest private energy groups. Eon operates in several areas of the energy business (by providing electricity, biogas, natural gas, gas oil, and heat), in which it produces, supplies, distributes, and sells most of these energy products to end-users. The company has a turnover of 34 billion SEK (2014), operates with 3,300 employees, and approximately 1 million customers in Sweden<sup>34</sup> (E.ON Sverige, 2014). These customers are handled by Eon Customer Support AB, which are a subsidiary company of Eon Sweden AB and the case company of this study.

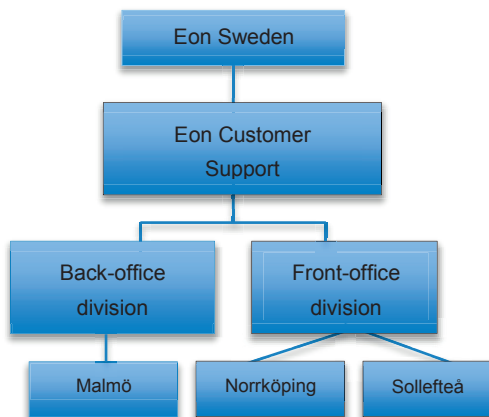
Eon Customer Support (referred to in this study as *Eon CS*) was formed in 2008 as part of a re-organization of Eon Sweden. Customer support operations in Eon Sales Sweden AB (formerly carried out at eight locations in Sweden) instead became Eon CS' primary business (Lövingsson, 2009). Eon CS operates in Sweden as a zero-profit center<sup>35</sup> and has the core business of managing relations with mostly individual, but also business, customers of Eon Sweden. These operations are carried out through the company's three in-house call centers. One of the call centers is a back-office division (Malmö, Sweden), and the two other constitute the front-office division that is divided into two facilities (Sollefteå and Norrköping, Sweden). Figure 3 shows the organizational chart.

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<sup>34</sup> The more precise number of customers was 1,131,000 in 2014 (e-mail correspondence with the NPS coordinator, in May 2015), which has since decreased.

<sup>35</sup> A zero-profit center is in this company defined as an operating unit that carries out services on behalf of partners. Eon CS signs agreements with partners (Eon Power Distribution Grid AB, Eon Sales AB, and Eon Gas AB) where they set a price on their services for these partners in advance, a price that is calculated for reaching a profit of 0 SEK. The agreements are based upon a strategy for handling varying volume of services over time (given customer's changing needs and partners' various initiatives) and for covering losses and sharing profit among partners (if resulting in a profit, above 0 SEK) (HR manager, June 2014).

Figure 3: Organizational chart, Eon Customer Support



Based on the purpose of this study, the empirical basis focuses on the operations carried out in the front-office division, since it has the initial, main responsibility for managing interactions with customers. The two front-office call centers also utilized an established system for measuring and comparing performance at an individual and group level. This system does not exist in the back-office division. Conversely, the back-office division manages the supporting administration of actions taken with customers after being processed by front-office agents. Such actions involve sending invoices, processing claims, and rectifying incorrect handling by the front-office employees in the IT systems. Given that the work tasks between and within the work groups in the back-office division also largely differ (for example, one task is completely handled by a single employee), performance is not compared either between or within the work groups.

### 5.2.1 The two front-office call center sites

Although the front-office division at Eon CS is considered one united center of competence<sup>36</sup> and has the same organizational structure, some features differ between them. For example, there are certain geographical differences, since one call center is located in the northern part of Sweden (Sollefteå), whereas the other is located near Stockholm (Norrköping). Since Eon CS is the largest private employer in Sollefteå, and the second-

<sup>36</sup> Division manager, November 2012.

largest in the entire municipality, this means that people living in or near Sollefteå often started working at Eon CS right after graduating high school. The division manager described the call center in Sollefteå as homogeneous, in which employees often recruit friends to create a sense of familiarity and friendship:

In [our facility in] Sollefteå, one knows each other. I mean, everyone there is related to each other! (Division manager, November 2012).

The call center conditions in Norrköping are rather different, given that the city is considerably larger, with more work options. Therefore, it is rare to work with friends and family at this call center. Since these call centers are distant from each other, their historical backgrounds are also quite different. These two call centers were originally derived from two separate companies that were bought and merged with Eon Sweden before Eon CS originated. Some components from these former companies are still valid. For example, there were a large number of agents in both call centers who had worked for the former and current companies. This allowed for comparing previous and current working conditions.<sup>37</sup> In addition, the fact that the two call centers carry out the same tasks spurred a competitive mode between them. Middle managers and the division manager both encouraged and discouraged competition between call centers.

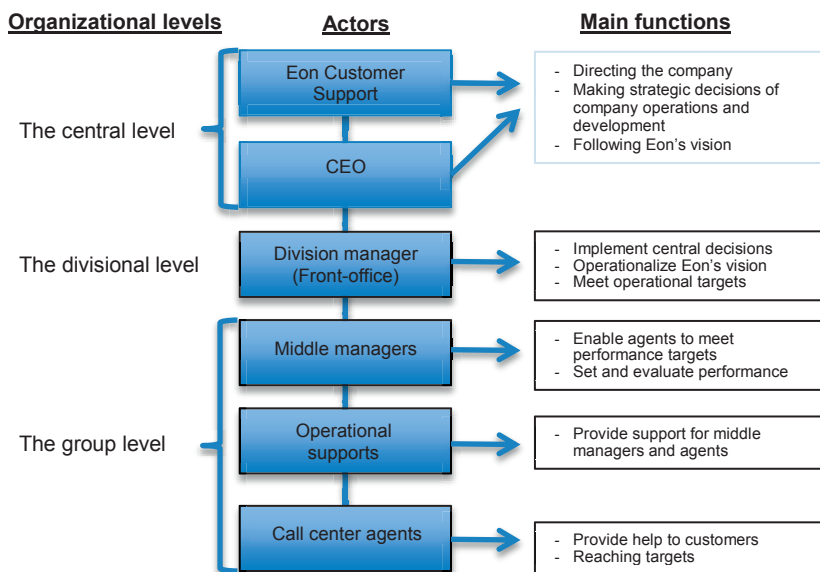
## **5.2.2 The organizational structure at Eon CS**

Eon CS is organized with three levels of management (central, divisional, and group levels). In line with the top-management group, the CEO makes decisions for the company at a central level. Such decisions aim to be in line with Eon's vision. However, the operative responsibility for carrying out these decisions is with the division manager (divisional level). The group level comprises managers for each work group (middle managers), the support function in each group (operational support), and call center agents (Figure 4).

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<sup>37</sup> For example, experienced agents often answered questions of culture during interviews and observations with the expression: "It's in the walls".

Figure 4: Organizational actors and functions in the front-office division at Eon CS



Since this study aims to understand performance and the elements that influence it in the call center context, the main emphasis is on understanding the operational components of the company. Therefore, my main attention is directed toward studying the division manager, middle managers, the operational supports, and call center agents.

### *The division manager at Eon CS*

The division manager’s main task is carrying out the decisions made by the CEO and the top-management group by implementing their decisions into the operative organization. The division manager develops the front-office business for it to reach its goals, which are to translate the vision of the company (Eon Sweden) “to deliver the most liked customer experience” and to become “one of the most highly ranked companies in our industry in terms of efficiency”.<sup>38</sup> The division manager also helps Eon CS develop a lean, transparent organization (E.ON Sverige, 2012). These aims are implemented by meeting a number of strategic objectives (KPIs) at the firm level that are benchmarked against the energy

<sup>38</sup> Division manager, November 2012.

industry.<sup>39</sup> The division manager also is mainly responsible for reaching a number of operational targets that are more detailed (such as errand times, Customer Satisfaction Index, NPS, and sales).<sup>40</sup> Although a certain influence is given to middle managers, since they have the main responsibility for the call center agents in their respective work groups, the division manager is still mainly responsible for the operations and performance outcomes of the work groups in the organization. The division manager also sets middle managers' salaries and bonuses based on the work group's success, for which each manager is responsible. Success is evaluated by whether or not the work group reached expected performance levels.

### *The middle managers at Eon CS*

A middle manager at Eon CS is at the lowest managerial level and is responsible for managing a work group of approximately 20 call center agents to help them meet their work goals. A middle manager's main responsibility is controlling and guiding the agents to reach the performance targets set out for them (determined by the middle manager, in agreement with each agent). These actions are followed by performance evaluations of the agents. The middle manager also sets salaries and bonuses for each agent in the work group and plans the call center agents' schedules, which must be in line with the current flux of incoming calls. A middle manager also is fully responsible for making sure that the dynamics between the agents in the group is functioning well. All 14 middle managers at Eon CS (one for each work group) report the group's activities and performance levels to the division manager.

### *The operational supports at Eon CS*

Each work group at Eon CS has one operational support role, which functions as an intermediary between the call center agents and their manager. The operational supports' main task is to facilitate agents' ability to carry out their daily work and provide help in solving specific problems. The operational supports possess detailed knowledge of how to carry out the call center work and are physically or virtually available in

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<sup>39</sup> The benchmark for the KPIs utilized by Eon CS (such as errand times) is based upon a consultancy report (conducted by CapGemini during 2011 with statistics from 2010). The targets are also benchmarked against (internal) operations within the Eon Group as well as externally – against peers within each industry at an international level (CFO at Eon CS, April 2015).

<sup>40</sup> Division manager, April 2015.

the group.<sup>41</sup> Their role also includes providing informal, but detailed reports to the middle manager of individual agents' performance and task execution to facilitate evaluation of the agent's development and ability to solve customer errands. During the last two years, the operational supports were assigned additional tasks that reduced their availability to provide help to agents and middle managers. The effects of their absence vary between groups, but generally resulted in agents approaching their colleagues within the work group for help and guidance to a larger degree than previously (see Chapter 7).

### *The call center agents and the work at Eon CS*

A *call center agent* refers to a worker with the initial main responsibility for the company's interactions with its customers. The majority of these interactions are initiated by the customers through incoming calls. The call center agents at Eon CS handle about 1 million customer calls each year.<sup>42</sup> A typical call generally includes solving more than one issue, in which the most frequent routine-based errands might include:

- Signing a new agreement, or re-signing agreements when current contract expires
- Asking for changes of the conditions of a current agreement (such as discounts, subscribing/renouncing environmentally friendly energy)
- Change of address
- Questions regarding variable, fixed, and mixed rates with various contract lengths
- Questions regarding invoices (unclear, incorrect, requesting a deferral if having problems paying, asking for electronic invoices)

However, the agents sometimes also need to answer questions and solve issues that do not frequently occur (generally referred to as *problem-based issues*), such as:

- Energy prices and other questions in relation to various energy sources in relation to signing a new agreement

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<sup>41</sup> For operational supports to be virtually available, they must be available to provide responses through the internal instant messenger online function (called Lync), which functions as a chat in which agents can write a message to any operational support and expect a response in a few seconds or minutes.

<sup>42</sup> The number of phone-based errands is decreasing each year (1 million in 2011, 880,000 in 2012 and, 850,000 in 2013, and 658,600 in 2014) (NPS Coordinator, May 2015).

- Issues relating to invoices that are not of a general nature (such as tracking down a former customer to pay an invoice, changes in relation to renewable energy)
- Questions regarding technical support of the company's energy device function (100 check), which provides consumers with direct information about their energy consumption
- Issues related to power outages (such as complaints or requests for reimbursement for damages caused by power outage)

While interacting with customers on incoming calls, the agents are also assigned to offer various sales agreements, such as insurance agreements in relation to change of address, energy from wind power, and technical equipment for measuring the energy consumption in the household. These sales agreements, also called *leads*, are commissioned by another subsidiary of Eon Sweden (Eon Sales) (see Appendix 3, Table 22) and are presented as a way to increase the company's revenue while giving the customer added value.<sup>43</sup>

Agents handle incoming customer calls through a headphone, with support from a computer (with two screens) and the integrated IT systems. In addition to these more traditional interactions, the agents can resolve issues through other channels, such as by responding to questions through the company's web-based chat (to a limited extent) and e-mail correspondence. The call center agents also handle administrative tasks such as taking care of correspondence from customers concerning contracts, payments, and other information that is received by mail. All in all, the operations carried out at these two call centers comprise low-skilled work, in which the agents primarily need general skills to carry out their tasks. Since agents don't manage these customer relations in person, and customers are routed to any available agent with the right knowledge (rather than to an agent with whom the customer has been in contact previously), the operations carried out by these agents are relatively anonymous.<sup>44</sup>

Eon CS operates with employed and temporary agents (referred to as *consultants*). Although the proportions shift between years, the average

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<sup>43</sup> Division manager, HR manager at Eon CS, November 2014.

<sup>44</sup> Customers can also solve more routine issues (such as receiving and paying invoices, changing address) on the company's website and mobile applications. Information from company presentation of "Eon's Extended Customer Service", received April 2015.

ration during the time of my study was at approximately 80 percent employed agents versus 20 percent temporary agents.<sup>45</sup> Forecasts of incoming customer calls and the available number of agents provide the basis for the number of consultants hired. The total number of agents also varied (252 in 2011, 274 in 2012, 244 in 2013, and 214 agents in 2014). In addition, the average agent is female,<sup>46</sup> works full time,<sup>47</sup> has been with the company for approximately six years,<sup>48</sup> is 36 years old,<sup>49</sup> and has a high-school degree as the highest educational level.<sup>50</sup>

Given the flat organizational structure (Figure 4), agents' opportunities for advancement are rather limited, since a large number of agents compete for positions within the support unit (a support group that handles agent scheduling), to become an operational support or a middle manager. Despite these low opportunities to advance, the turnover among the agents at Eon CS was rather low during the time of my study.<sup>51</sup> Agents' salary growth and bonus size is determined by the middle manager during performance appraisals (Chapter 6.1). However, hired agents do not receive bonuses and are excluded from salary discussions with the middle manager. Instead, the recruitment firm sets their salaries.

### **5.2.3 A representative example of agents' daily work activities**

To understand agents' working environment and operations that are carried out at Eon CS, two representative examples of a general working day for an agent working in the front-office division are presented. The two figures below (Figures 5 and 6) illustrate an individual schedule that

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<sup>45</sup> The proportion of employed/hired agents was similar at both sites, and was 80 percent/20 percent (in 2011), 88 percent/12 percent (2012), 86 percent/14 percent (2013), and 79 percent/21 percent in 2014.

<sup>46</sup> The proportion of females was 70.5 percent (2011), 73 percent (2012), 72.8 percent (2013), and 68 percent (in 2014).

<sup>47</sup> The average rate of full-time employees among the agents was 89.5 percent (2011), 78.2 percent (2012), 84.9 percent (2013), and 87.3 percent (2014).

<sup>48</sup> The average length of employment was 4.9 years (2011), 6 years (2012), 7.1 years (2013), and 6.8 years (2014), with similar proportions at both sites.

<sup>49</sup> The average age of front-office agents was 35.5 years (2011), 35.6 years (2012), 37.4 years (2013), and 36 years (2014), with similar proportions at both sites.

<sup>50</sup> There was an average of 72.7 percent (2011), 79.5 percent (2012), 69.7 percent (2013), and 80.4 percent (2014) of agents with high school as the highest level of education.

<sup>51</sup> Employee turnover (exits/average number of employees per year) was approximately 1.75 percent (second half of 2011), 5.09 percent (2012), 4.91 percent (2013), and 5.1 percent in 2014.

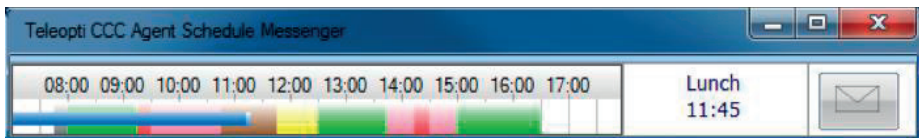


is more generally referred to as *the ruler*.<sup>52</sup> The ruler is included with different tracks that represent the type of tasks and activities the agents should carry out during a specific time of the working day. Since the tasks are routinized and similar, they can also be structured according to a number of tracks. The daily activities do not significantly differ between agents, only the specific time of the day when they should be carried out. The two rulers illustrated below slightly differ, since they represent various shifting demands for which types of tasks must be handled by the agents during the working day. Since the individual ruler is based on forecasts, it can also change during a workday due to an unexpected flux of incoming calls.

Figure 5: Example of an individual ruler at Eon CS



Figure 6: Another example of an individual ruler at Eon CS



The division manager explained that this ruler (or IT-based schedule) was to be strictly followed by each agent by the minute, since the IT system logs and categorizes each agent's activity according to the tasks they are supposed to carry out at that specific time. Following this schedule enables accurate performance statistics that are visible to both middle managers and agents.<sup>53</sup> On rare occasions, agents can request a change of track in their schedule (such as if they are sick or unable to work). Moreover, the tracks are marked in different colors to show an overview of the workday and make the agents aware of when to change tasks.

For example, the grey area represents the first 15 minutes of the working day, which should be spent starting the computer, opening the programs

<sup>52</sup> Both figures were received from the head of production planning at Eon CS, May 2013.

<sup>53</sup> This way of organizing work is a functional tool: "Here we manage in detail at an individual level, where people are the tools" (HR-manager, February 2014).

that will be utilized during the day, reading information at the company intranet, and reading e-mails. This is generally referred to as the *information quarter*. The green area that follows represents the time that agents are scheduled to talk to customers on the phone and stand by on the phone, ready to talk to customers when they call. The green time constitutes the major part of agents’ working day. The red areas represent scheduled breaks, whereas yellow represents the scheduled time for lunch. Finally, the brown, pink, and purple areas represent various administrative activities and time for responding to e-mails (off-phone activities). Table 13 presents a more detailed illustration of the agents’ daily work activities, which emphasizes the physical and psychosocial part of a workday in the two call centers.

**Table 13: A representative example of a regular workday for an agent at Eon CS**

Time	Activity and description	Purpose
7:45-8:00	<i>Scheduled information quarter:</i> Arriving at work, greeting other agents, starting the computer and programs, reading information at the intranet, reading through e-mails.	Daily start-up, getting updates and information
8:00-9:00	<i>Sitting by the desk:</i> Answering customer inquiries and solving errands on the phone (green time).	Working according to schedule, on phone
9:00-9:15	<i>Scheduled break:</i> Drinking coffee in the kitchen, sitting in the office/dining area, talking to agents in the group/other groups, visiting restrooms.	Pause from phone/work
9:15-10:30	<i>Sitting by the desk:</i> Answering customer inquiries and solving errands on the phone (green time).	Working according to schedule, on phone
10:30-11:15	<i>Sitting by the desk:</i> Scheduled time for formulating and responding to e-mails, solving errands and problems.	Working according to schedule, pause from phone
11:15-12:00	<i>Scheduled lunch:</i> Agents walk to the kitchen to heat up food, sitting in dining room, usually talking to other agents in their group.	Pause from work
12:00-13:00	<i>Sitting by the desk:</i> Answering customer inquiries and solving errands on the phone (green time).	Working according to schedule, on phone
13:00-14:00	<i>Sitting by the desk:</i> Carrying out administrative work, solving administrative errands and problems.	Working according to schedule, pause from phone
14:00-14:15	<i>Scheduled break:</i> Drinking coffee in the kitchen, sitting in the office/dining area, talking to agents in the group/other groups, visiting restrooms.	Pause from work
14:15-16:30	<i>Sitting by the desk:</i> Answering customer inquiries and solving errands on the phone (green time).	Working according to schedule, on phone

## 5.3 Chapter summary

This first empirical chapter introduced the industry within which the case company is operating, inherent challenges and developments in the industry that affected customers' opinions of the case company as a service provider. This chapter also described specific features of the case company (company background, organizational structure, and main actors of interest), the core operations and tasks Eon CS, and a brief overview of the agents who work in these two call centers. These descriptions provided initial insights into the case company and its context to set the stage of this research, but also represented how a specific type of call center organization functions. The next chapter, which is the second empirical chapter in this study, provides a more detailed presentation of how performance is conceptualized at Eon CS.

# Chapter 6 | Performance at Eon CS

To further our knowledge of how to manage performance in a call center context, this second empirical chapter will move forward from insights gained in Chapter 5 to provide a detailed presentation of how performance is conceptualized at Eon CS. This chapter is divided into two parts. The first part (Chapter 6.1) describes how performance is measured and evaluated at Eon CS, which reflects how the actors understand performance. The second part (Chapter 6.2) reflects my analytical interpretation of how performance is conceptualized at Eon CS. This part of the chapter presents an analytical categorization of performance (the three performance categories), which will be used to highlight various performance levels at the group level within the four chosen subcases for this study. I will also present a ranking between the four subcases based upon performance levels over time. This is followed by examples highlighting individual performance differences within these subcases, including distinguishing performance trends.

## 6.1 Measuring and evaluating performance at Eon CS

A basic introduction of how performance is measured and evaluated at Eon CS will allow further understanding of how performance is regarded and used in the case company. This will serve as a guideline for grasping what good and poor performance is associated with in this specific organization.

### **6.1.1 Performance measurement at Eon CS**

Management at Eon CS operates with various performance metrics (KPIs) for measuring various outcomes of agents' actions at work, which are also aggregated at the group and organizational levels. Some performance metrics measure internal activities within the two call centers, such as the duration of handling customer errands (such as talk time, wrap-up time, and errand times for various requests), and efficiency in handling sales activities and administrative tasks. Other types of performance metrics reflect outcomes related to personnel management (absence, employee turnover, and personal attitudes). Eon CS also operates with performance metrics that measure internal activities from an external view, which emphasize customers' views of the company's service delivery (such as Net Promoter Score [NPS] and Customer Satisfaction Index). A complete list of performance metrics utilized at Eon CS is described in detail in Appendix 3 (Table 22). All operations are measured through the company's integrated IT systems that log agents' activities when following their individual schedules (the ruler, described in Chapter 5.2.3) that, in turn, generate individual statistics. These statistics, referred to in this study as *performance data*, are then evaluated.

### **6.1.2 Performance evaluation at Eon CS**

Performance data is continuously evaluated by middle managers through the use of two interconnected tools: Pre-determined targets, and behavior-based performance evaluation. These tools form the underlying components for the actual evaluation tool to set agents' bonuses and salaries at Eon CS.

#### *Pre-determined targets*

Middle managers set pre-determined targets for each agent within all utilized metrics at Eon CS, which are derived from the operational targets that the division manager sets for the work groups in the call centers. Pre-determined targets are a yardstick for evaluating how well an agent and a work group perform according to expected levels. This is calculated by whether or not agents met the targets, and how much above or below they (on average) performed, during a month or/and a year. Targets at Eon CS are jointly set at the individual level between the middle manager and the agent. During my study period, agents suggest a target and level toward which they are willing to work during the year. However, this practice

was not always successful, given that agents' interest in setting up their own goals was occasionally low (this did vary within and between work groups). In these cases, middle managers set yearly, monthly, or even weekly targets for agents. Appendix 3 (Table 22) shows actual targets for each performance metric.

Although the main aim was to meet pre-determined targets, company documents showed that middle managers were also supposed to take personal circumstances (such as illness or absence) and other extenuating circumstances (such as change of tasks during the year) into account during performance evaluations. Company documents also noted that 60 percent of the performance evaluation for determining agents' salaries and bonuses should be based on actual performance (rather than on behaviors, see below).

#### *Behavior-based performance evaluation*

Agents' overall behaviors at work were also evaluated as performance, in terms of their attitudes towards work (such as RMA) and their level of willingness to help colleagues. This type of performance (referred to as *soft metrics*) is evaluated by middle managers through their subjective opinion of whether or not each agent's behavior is in line with set targets (preferred behaviors). Company documents highlighted that 40 percent of the performance evaluation for determining salaries and bonuses should be based on this behavior-based performance evaluation.

#### *Evaluation tool for performance appraisals*

Table 14 shows the actual evaluation tool middle managers use to evaluate individual performance. This tool, which includes the ones presented above, is based upon a five-point performance scale, wherein each scale is calculated and determined by a percentage of expected level of performance (a scale from 0 percent to 200 percent).

Table 14: The evaluation tool for bonus and salary, five-point performance scale, Eon CS<sup>54</sup>

Type of performance/ Scale	Description of the performance level	Percentage of expected level of performance
<b>Extraordinary performance</b>	Fantastic performance, clearly above expectations. Helps others to understand the reason for change. Responsive to other people's unwillingness to change, supports and motivates them to accept and to adapt to change. Possesses an extraordinary co-creative approach and is a good ambassador for Eon.	151%–200%
<b>Very good performance</b>	A considerably good performance, in which targets were exceeded. Acts with drive and commitment in relation to change. Learns from their own and others' successes and mistakes to test new paths. Works with great determination and focus to achieve company goals.	116%–150%
<b>Good performance</b>	A good performance that is somewhat over or under the expected performance level. Willing to try new things and takes is business risks. Open to new ideas and adapts quickly to change. Takes the initiative to change and develop their own work and tries to influence others to do the same.	85%–115% (target level)
<b>Performance that partly meet expectations</b>	A performance that does not fully meet expectations. A smaller gap to the target level. Holds onto old methods. Often requires a long time to adjust to changes, often keeps old accustomed track.	50%–84%
<b>Performance clearly below expected levels</b>	A performance that is well below expected levels. Does not reach targets. Focuses on problems and obstacles to change. Avoids risks and new approaches to solve problems. Quickly blames others for mistakes and problems. Consuming behavior.	0%–49%

This evaluation tool is the basis for discussion between the middle manager and each agent during the formal, individual performance appraisals that take place at least twice a year. Apart from these structured, planned meetings, frequent informal follow-up meetings are also carried out between the agent and the middle manager during the year. These meetings keep the middle manager updated regarding the status of the agents' performance and proximity of reaching targets. In addition, how individuals perform is communicated to the division manager on a general level. However, agents' work behaviors and performance levels are more often discussed among the middle managers working at the same call center site. Table 15 summarizes the structure and content of the performance appraisals.

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<sup>54</sup> Information received from an Eon CS presentation for follow-up, payroll, and performance in the case organization for 2011/2012. Based on company documents, it should also be noted that this evaluation tool does not seem to be based upon an aim to become a world-class call center.

**Table 15: Performance appraisals at Eon CS<sup>55</sup>**

Structure /Content	Included actors/structure	Content
<b>Performance appraisal 1</b>	The agent and the middle manager; occurring at the end of January each year, lasting for two hours	Salary and bonus dialogue. Middle manager explains decision for the level of salary and bonus for the agent based upon performance during previous year. New targets are set for the agent for the upcoming year. Suggestions from agent of motivating targets and from middle manager of suitable targets.
<b>Performance appraisal 2</b>	The agent and the middle manager; occurring in August each year, lasting for two hours	Follow-up dialogue of salary and bonus. Discussing target achievement, performance and skill-development so far during that year.
<b>Informal follow-up meetings</b>	Informal meetings continuously during the year, monthly	Keeping middle manager updated of the agent's status, changes and challenges.
<b>Total</b>	Individual meetings, covering the entire year	Middle manager evaluates agents in all parts of their work and tries to have constructive dialogue about what is required by both parties to make them reach set targets, for individual and group. Establishing actions of how to improve agents' results and work satisfaction in relation to commitment and development, and to increase engagement for the group and the company.

## 6.2 The three performance categories

The above descriptions and examples of how performance is measured and evaluated provided basic insights of how actors at Eon CS understood and operationalized performance. The following part of this chapter will present my analytical interpretation of how performance is conceptualized at Eon CS. More specifically, since I will use the detailed performance metrics utilized at Eon CS as the only measurement for understanding performance in these call centers, these metrics will also form my analytical understanding of call center performance. By going into detail in each performance metric,<sup>56</sup> three performance categories were generated. These categories will highlight variance in performance at the organizational and group levels within the four selected subcases for this study, but also at the individual level over time.<sup>57</sup>

<sup>55</sup> Information received from Eon CS presentation for follow up, payroll, and performance in the organization for 2011/2012.

<sup>56</sup> Chapter 4.3.1 details how the analytical coding process was carried out.

<sup>57</sup> Specific details, including actual targets for each performance metric for agents at Eon CS, are included in Table 22, Appendix 3. Actual performance data at the organizational level is presented in Table 23, Appendix 4.



### **6.2.1 Performance category A: Routine-based efficiency**

As the majority of issues that call center agents at Eon CS face and resolve in their work are recurring, some performance metrics primarily reflect agents' efficiency in handling routine errands. Performance within these metrics reflects *routine-based efficiency*. Efficiently performing (incoming) routine-based errands reflects a focus on quantity and speed within all parts of the actual errand, from talk time (the duration of talking to customers) to wrap-up (time spent finalizing each customer errand in the system), and determines the total errand time (total time to solve an errand on phone). The agent's efficiency in solving routine-based errands is also evaluated by the performance metric of rate of telephone efficiency (the rate of solved errands during a scheduled hour of interacting with customers on phone, or during green time). This also reflects agents' abilities to quickly, recurrently prepare for an upcoming customer call. The underlying logic for performance within this category is that rapid handling of routine-based errands is evaluated as good performance, given that these performance metrics are measured by the minutes and seconds agents spend on handling a customer errand. This generates a rate of efficiency.

Actual performance data within this performance category showing organizational performance during the time of my study (Table 23, Appendix 4) highlights that the performance-management system is not entirely functional when it comes to establishing the rate of telephone efficiency based upon performance within solved errands. Since the performance data shows that talk time on an organizational level was relatively stable over time, but also that performance within the metrics of wrap-up time and total errand time on phone improved over time, this should imply improved telephone efficiency over time. However, performance reflecting telephone efficiency instead fluctuated over time at an organizational level. This resulted in targets for routine-based efficiency that were not met during the entire time of my study. This performance data indicates that there were other elements significant in regard to routine-based efficiency.

## 6.2.2 Performance category B: Social efficiency

Given that some of the performance metrics on which call center agents at Eon CS are measured were evaluated both from an efficiency-based approach and from quality levels in terms of how well agents interacted with various customers, I chose to categorize one performance category as *social efficiency*. Performing with social efficiency reflected an agent's ability to satisfy a customer and/or succeed with sales in a qualitative, fast manner. This allowed the agent to reach set targets for customer satisfaction and/or sales rates, and time-based targets for customer interactions. The performance metrics included in the category of social efficiency are talk time (the part of the interaction spent talking), which is evaluated on its implications for the other two performance metrics in this category: Customer-satisfaction (how satisfied customers are with the overall interaction with the agent) and sales productivity (skills and quality in the sales procedure during the talk interaction with customers).

Actual performance data at an organizational level (Table 23, Appendix 4) clarifies two trends at Eon CS within this performance category. First, since the customer satisfaction ratings increased over time as the talk time remained stable, this indicates that agents performed with increasing levels of social efficiency over time. This trend meant that the target for customer satisfaction was met at the organizational level three years in a row (2012, 2013, and 2014). However, the second trend showed shifting performance levels over time, which primarily concerns the organization's sales performance. For example, impeded sales rates (between 2012 and 2013) resulted in a failure to reach the target at the organizational level (in 2013).<sup>58</sup> A significant improvement (during 2014) resulted in performance levels well above the target (in 2014), indicating that agents performed with unstable levels of social efficiency over time at an organizational level. However, both trends reflect varying performance levels over time at an organizational level in regard to social efficiency.

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<sup>58</sup> Increased emphasis on sales (further described in Chapter 7) also entailed refined measurements of sales performance at Eon CS (see Table 22, Appendix 3).

### **6.2.3 Performance category C: Problem-solving efficiency**

Although the majority of issues handled from incoming calls were routine-based errands (Chapter 6.2.1), some performance metrics reflected deviating errands, which I refer to as *problems*. These can be specific issues (technical problems, dealing with power outages, or problems that require changes in the company systems) that must be solved differently each time since there are no established routines for how to solve them. These problems most often occur during non-verbal interactions with customers. However, they are still measured and evaluated from an efficiency-based approach (the greater the efficiency in terms of minutes and seconds, the better the performance), which basically neglects that problems could require more time to solve since they do not frequently occur. Therefore, I labeled performance within this performance category to reflect *problem-solving efficiency*.

Performance data in this category (Table 23, Appendix 4) highlights a clear trend that actual organization performance levels were not aligned with expected performance levels during the time of my study. This trend was evident regarding the performance metrics of e-mail efficiency (the time spent responding and completing a customer errand/problem by e-mail and web-based chat) and administrative efficiency (the average amount of completed administrative errands and problems per scheduled hour of administration work). Performance data showed that no targets within these two performance metrics were met at an organizational level. However, the data also showed varying performance levels over time at an organizational level in regard to problem-solving efficiency. This trend was evident, since performance within e-mail efficiency improved over time (which indicated that agents increased levels of problem-solving efficiency over time) but varied in regard to administrative efficiency (indicating fluctuating levels of problem-solving efficiency over time).

### **6.2.4 Summarizing the three performance categories**

My analytical interpretation of how performance is conceptualized at Eon CS showed that performance could be categorized into three different categories highlighting varying performance levels at an organizational level within each category over time. It was also clear that the overall aim

to be efficient<sup>59</sup> (performance categories A, B and C) and reach increasing rates of quality (performance category B) is a deliberate performance strategy:

We need to increase both customer value and customer quality, and to strive for increased productivity (CFO, April 2015).

I will now present my view of performance at a group level, which is derived from patterns of performance in the four subcases selected for this study.

### 6.3 Performance in the four subcases

Actual performance data (from 2011–2014) clarifies that the four selected subcases<sup>60</sup> were a representative sample of agents and work groups, given that they represent different levels of performance. Company guidelines for performance evaluation and my analytical interpretation of what each performance metric represented enabled me to rank these subcases.<sup>61</sup> Table 16 shows the ranking (represented by the number in front of each subcase), presented in terms of the three performance categories. This demonstrates my understanding of which type of performance and area of call center work within which each subcase tended to perform high or low.

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<sup>59</sup> The large focus on efficiency in company operations at Eon CS also spurred it to initiate various projects and re-organizations of work groups during my time of study (such as reducing operational costs by increasing staff flexibility for speeding up processes when assigned tasks, physical re-organization of work groups, and aiming to improve the performance culture).

<sup>60</sup> Criteria for selecting the four subcases are presented in Chapter 4.2.1. Examples of performance variations in these subcases are illustrated in Table 24, Appendix 5.

<sup>61</sup> The main criteria for the performance ranking within each performance category metric are based on the subcases' performance level against: Average performance in the company for each year; pre-defined targets for each year; and performance levels in all other work groups in Eon CS (14 in total) for each year between 2011 and 2013.

**Table 16: Summary of performance and ranking in the four subcases<sup>62</sup>**

	Metric/Level of Performance	Excellent/Good Performance	Mediocre/Poor Performance
(A) Routine-based efficiency	Wrap-up, Total errand-time, Telephone efficiency	1. Delta 2. Beta	3. Epsilon 4. Gamma
	Talk time (A) <sup>63</sup>	1. Delta	2. Epsilon 3. Gamma 4. Beta
(B) Social efficiency	Sales	1. Delta 2. Gamma	3. Beta 4. Epsilon
	Customer satisfaction	1. Gamma 2. Beta 3. Delta	4. Epsilon
	Talk time (B)	1. Gamma	2. Epsilon 3. Beta 4. Delta
(C) Problem-solving efficiency	E-mail efficiency	1. Beta	2. Delta 3. Gamma 4. Epsilon
	Administrative efficiency		2. Epsilon 3. Delta 4. Gamma

Table 16 highlights equal performance trends within the metrics included in performance category A between the four subcases. This strongly implies that there are some mutual features prevailing in these subcases that influence routine-based efficiency at Eon CS. The table also shows that Case Delta was particularly efficient over time when talking to customers (talk time A) compared to the other three subcases. On the other hand, Case Beta clearly deviated from performance within the other metrics in this performance category by its tendency to spend the longest average time talking to customers, but still was the second most efficient in handling routine-based errands compared to the other subcases.

With regards to performance category B, the subcases showing excellent/good performance within sales tended to be less skilled at satisfying customers. This distinction was especially valid in Case Delta, which performed well within sales, but less so in satisfying customers compared to other subcases (even though Case Delta performed well within both

<sup>62</sup> Performance within each subcase in each performance category is divided into: *Excellent performance* (well above group-based target), *Good performance* (just above, or on, group-based target), *Mediocre performance* (just below group-based target) and *Poor performance* (well below group-based target).

<sup>63</sup> Talk time (A) is evaluated by an efficiency-based approach, in which short talk time is preferred, since it enables greater overall efficiency in phone-based errands. Talk time (B) is evaluated according to whether or not the average tendency of the talk time meant positive or negative output for sales rates and customer satisfaction.

metrics). When evaluating the impact of talk time upon sales and customer satisfaction, the time that agents in Case Gamma spent talking with customers tended to entail high sales rates and high customer satisfaction in relation to the other subcases. Also, despite that Case Gamma's relatively low performance within routine-based efficiency, its performance levels regarding social efficiency implied high quality in their interactions. These indications highlight that performance reflecting social efficiency could be complex to understand, which might require further study to reveal its drivers.

Equal performance trends also prevailed between the four subcases within the performance metrics included in performance category C. Case Beta distinguished itself by reaching high performance within both metrics in this category. However, since performance levels within the other subcases differed between the two metrics in relation to each other, this implies that features required to reach high performance reflecting problem-solving efficiency might differ, especially in Case Epsilon.

Certain corresponding tendencies were also found between performance categories. For example, Case Gamma and Case Epsilon both performed poorly overall regarding routine-based efficiency and problem-solving efficiency. Conversely, there were also significant differences between these two performance categories. For example, Case Delta demonstrated high levels of routine-based efficiency but considerably lower performance at efficiently solving problems. Performance differences between subcases also highlight the fact that middle managers at Eon CS face dissimilar, shifting challenges to succeed in helping a large number of agents continuously reach their targets that allow for meeting operational targets at the group level.

### **6.3.1 Examples of individual performance levels**

I will now briefly present my view of performance at the individual level. Performance data basically showed that individual levels of performance at Eon CS varied over time. This was especially clear when separating the lowest- and the highest-performing call center agents in each subcase within each performance category.<sup>64</sup> Variations at the individual level

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<sup>64</sup> A summary of internal performance trends in the four subcases is illustrated in Table 25, Appendix 6A. Actual performance data of the differences between high and low performing agents within each of the four subcases over time is illustrated in Tables 26–29, Appendix 6B.

resulted in three different performance trends within the subcases. First, individual differences between high and low performers decreased over time within each performance category (particularly in Case Gamma and Case Epsilon), which resulted in a homogenizing trend within the subcases over time. Second, individual performance differences between high and low performers also increased over time, which resulted in a heterogeneous trend that was especially evident in Case Beta (regarding routine-based efficiency) and in Case Delta (regarding social efficiency). Third, individual performance variations also resulted in a volatile performance trend within the subcases, since individual performance data also demonstrated shifting performance levels from year to year between high and low performers. This prevailed in each performance category and subcase.

In addition to acknowledging performance variations within each performance category and subcase over time, performance data also revealed that individual performance levels differed within each subcase to various degrees. The most significant performance differences prevailed among agents in Case Beta (social efficiency, problem-solving efficiency), Case Delta (routine-based efficiency), and Case Epsilon (social efficiency). These differences in individual performance demonstrate that agents in each subcase performed differently within various areas of call center work.

## 6.4 Chapter summary

This second empirical chapter presented a detailed description of how performance is conceptualized at Eon CS, including how various performance metrics were measured and evaluated. The chapter also described my view of how performance is conceptualized at Eon CS, which was presented in terms of three performance categories. These were used both for structuring types and levels of performance between the four selected subcases and for ordering individual performance differences within these subcases. Performance data highlighted varying performance levels at organizational, group, and individual levels within each category over time. Chapter 7 will elaborate on call center agents' and managers' perceptions of the elements that influence performance (in terms of performance metrics) in this context. This presentation will be strictly

based on qualitative data. These perceptions, in addition to my analytical categorization of performance at Eon CS, will be analyzed in detail in Chapter 8.





# Chapter 7 | Elements that influence performance

This third empirical chapter will present and elaborate on the responses received from actors at Eon CS during interviews and observations. When analyzing these responses in relation to performance, four elements were generated. The empirical material showed that the individual element of coping and three interpersonal elements (contextual, control-based, and cultural elements) influence performance in this call center setting. The following text will provide a fine-grained presentation of each element and its impact on observed performance.<sup>65</sup>

## 7.1 The individual element: Coping

Based on empirical interviews and observations, the element of coping was significantly important for performance in this call center context. *Coping*, which refers to various strategies that employees adopt when handling and learning a job, is an individual element in this study, since coping strategies vary between individuals (Harry, 2014). Based on interviews and observations, three distinct categories of coping strategies were recognized: Fight-based strategies; flight-based strategies; and forgo-based strategies. Descriptions and manifestations of each strategy, and how they affect performance, will be elaborated in the following empirical presentation.

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<sup>65</sup> Structuring this empirical material according to these four analytical categories, rather than on the preliminary theoretical framework, allows me to present a large amount of complex data that is rich in detail and in close relation to the operations in the case company, which will better serve the purpose of this study (further described in Chapter 4.5).

### 7.1.1 Fight-based coping strategies

The *fight-based coping strategies* reflected behaviors in which individuals actively fight their lack of knowledge of how to solve perceived problems. Interviews and observations revealed that call center agents fought their lack of appropriate knowledge especially in two different ways: Rapidly gaining knowledge by sharing it internally in the work group; and Resisting-based behavior. Both of these coping strategies will be discussed in the following paragraphs.

#### *1. Gaining knowledge through internal knowledge sharing*

In this study, *internal knowledge sharing* refers to the process of information exchange (skills, knowledge, and expertise) between agents within a specific work group. Sharing information and experiences less formally (since this practice was not explicitly defined in work routines) enabled individuals to gain practical knowledge required for solving a specific problem (such as details regarding a customer errand) for which the agent does not possess the appropriate knowledge (such as not having experienced this type of problem before). This coping strategy is an active approach toward learning, since the individual must accept that appropriate knowledge is lacking, and then process and solve that lack of knowledge. In addition, handling the work by using knowledge from colleagues within the same work group was based on a general perception among agents and middle managers that it was more time-efficient (faster) to ask (physically) close colleagues for information rather than to search within the company's computer systems, knowledge base or routines, or to ask their operational support or colleagues in other work groups for answers. Therefore, time is an important contextual component for understanding why agents utilize this coping strategy (in addition to certain laziness). This strategy aims to solve specific problems based on lack of knowledge, and solve them as efficiently as possible. However, the strategy is also based on a willingness among colleagues to help agents with lower levels of experience and knowledge, which not only has implications on individual performance but also on the performance in the group. For example, helping less experienced agents solve certain problems was beneficial for the efficiency of the knowledge-seeking agent, given that a relatively short amount of time was spent gaining the right type of knowledge. This resulted in quickly solving the problem at hand. However, it was less efficient for the knowledge-providing agents (in the short term), since they utilized their own working time to instead

help their colleagues (usually done during the scheduled time for wrapping up their own customer errands). Helping less experienced agents solve their problems resulted in longer wrap-up times, an impeded number of calls made during a scheduled hour, and lower efficiency rates. Some more experienced agents explained the impact on their performance:

We are good at taking time for helping each other out, but that is something that we might not afford statistically. Those of us who have been here longer [more experienced agents] help the new ones extremely much. There have been some frustrations regarding that. Many of the young ones have fast errand-times but at the same time, among us others more experienced people, the errand-times have instead become worse because you need to help these new ones all the time. Maybe they say "Oh, can you help me here?" and you go there and maybe it's a real problem that takes 7–8 minutes to solve (Agent, Case Delta, November 2014).

Rather than spending time on the phone waiting for accurate information from the work group's operational support,<sup>66</sup> these agents realized it was more efficient to turn to their colleagues to solve a problem related to their tasks.

Many avoid calling the operational support. We have a new system where we are supposed to call the operational support, but if you are in a hurry it's very easy to turn the chair around to a colleague to say, "how would you have done here?" That goes a lot faster. But of course that affects the errand times and that is probably not the idea (Agent, Case Gamma, November 2014).

Fighting against lack of knowledge by being provided information resulted in less beneficial conditions for the knowledge-sharing agents.

If you are helping someone in the group, then of course I'm suffering for it. It takes time to help each other as well, we have different missions and sometimes it can be something that's very complicated that we help each other with solving. You ask each other if you need to solve a problem (Agent, Case Gamma, November 2014).

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<sup>66</sup> Although the work group's operational support was aimed at helping agents resolve problems, it became clear that their physical availability was impeded after February 2014, as a result of changed communication routines (since the rate of sick leave among the supports had risen in 2013). Instead of physical contact, agents were instructed to call a central support number, answered by any of the operational supports in the organization. This frustrated the agents, since the support function often failed.

Of course it [helping] affects the wrap-up, it takes time from the colleagues who are supposed to do something else. But all the new ones that are not as experienced need help from us, they only had about 2 to 3 weeks of training and it's difficult to learn from that, it's too much information at once. But if you feel that you have good statistics, it's not a big problem since you don't get stressed about it (Agent, Case Delta, November 2014).

The short training period when starting the job mainly only taught certain skills at a superficial level. Both experienced and inexperienced agents understood that newly recruited agents relied upon more knowledgeable colleagues to learn how to carry out tasks that were more problem-based (Chapter 7.2.1). The newly recruited agents' learning curve was facilitated by more experienced agents. From the perspective of the more experienced agents, this way of coping was not equally straightforward, as it took much of their time, so contributed to poor performance levels. Basically, management did not account for helping others when having follow-up meetings of the agents' statistics (Chapter 7.2.2). The positive gain for inexperienced agents (being able to solve a problem) was prioritized among management and experienced agents above perceived levels of (increasing) stress from experienced agents providing recurring help (given that their performance levels were low). Regardless of their performance levels, spending time helping others learn the job did contribute to improved efficiency levels for the entire work group, compared to spending additional time searching elsewhere for knowledge. It was generally understood that searching for knowledge outside the work group and waiting for help from the operational support was more time-consuming than asking a colleague.

Previously, we called the credit division or the settlement division in Malmö [the back-office division] several times a day... that was a bit time-consuming... but now we have all skills in the group. It's a lot faster (Agent, Case Beta, December 2012).

In addition, this coping strategy was generally accepted and encouraged by middle management, given its (mainly) positive effects on learning and performance. However, middle managers needed to keep track of impaired performance levels among the experienced agents, given that knowledge-seeking individuals tended to turn to the same colleague for help (creating an informal operational support in the group; Chapter 7.2.1).

Solving specific problems by actively fighting against lack of knowledge in a timely manner through informal, internal knowledge sharing had both negative (group-based on-phone efficiency) and positive implications on performance in this setting (individual on-phone efficiency of the knowledge-seeking agent, and individual- and group-based problem-solving). Also, the extent to which this coping strategy was adopted in the daily work differed between agents and work groups, given that performance levels, skill levels, and the number of experienced and inexperienced agents in a work group varied over time.

## 2. *Engaging in resisting behavior*

In this study, *resistance* refers to individual behavior aimed at opposing managerial rules. In this setting, resistance manifested as an individual behavior of actively fighting the system in which problems are generated, rather than accepting it and handling their lack of knowledge. These informal behaviors temporarily fight against solving the lack of knowledge of how to succeed with carrying out work in line with requirements. These problems primarily were based on perceiving difficulties in following managerial instructions and procedures for carrying out the work, and managing an increasing work pace. I found that call center agents fought against the system mainly by manipulating their own time (such as their work schedule) to their advantage. More specifically, these agents behaved like so-called self-made operational managers by creating their own hidden, systematic work schedule based on time management. This coping strategy deviated from managerially defined rules and manifests as clearly breaking the rules at work. Middle management needed to constantly chase loopholes in the company's IT system to keep efficiency high and costs low, and create functionality between the number of working agents and the flow (and forecast) of incoming customer calls. However, opposing managerially defined rules of work had positive impacts on individual efficiency, until a manager detected the behavior.

I have a large number of self-made operational managers in my group, they choose what [errands and issues] they want to solve. I for example had one agent that did not want being scheduled for solving credit issues because it was a bit tough but instead she only worked with solving credit receipts. And when I look at her overall performance [statistics], it looked like she performed very well. But when you suddenly looked at it in detail, it turned out that she hadn't solved any credit errands for three whole months! So when I asked her it was just... Damn! She caught me! And

that is a refusal of work. It's not visible in the system when looking quick but when going into detail and check "what is the reason for this" you can see it. It usually strikes through somewhere (Middle manager, Case Gamma, November 2014).

Developing creative ways to resist following their schedule and fight the system, instead of actively working toward handling perceived problems (such as experiencing the work as demanding, solving administrative errands instead of answering the phone, or perceiving rapidly shifting work tasks to be too demanding) comprised an effective coping strategy for individuals but not for the organization. The inability to handle control at work also resulted in resisting following the schedule:

Sometimes it's challenging that it's so much control. "Everybody into the phones, all out of the phones!" Make a decision! It happens under extremely high pressure on phone. How can I [now] catch up with my errands? Sometimes I don't care about it [the manager's instructions] and do my own stuff, I actually do the contrary to what I should. I don't tell the manager, I'm sitting in the corner (Agent, Case Epsilon, March 2012).

Although this informal behavior impeded business operations from running cohesively with the demand from the external environment, it also contributed to higher individual efficiency on the phone. In addition, agents explained in interviews that resisting following the schedule was not always aimed at improving their own efficiency. Going contrary to managerial rules was sometimes carried out to favor the customer. Handling a customer problem as efficiently as possible, even though it might include time manipulation, was implied to also result in more satisfied customers. Resistance toward the system is a complex behavior that benefits individuals working alone, as well as customers. In addition, resisting behavior based on manipulating individual time prevailed to varying degrees in the work groups and was primarily performed by agents with a few years of experience with the call center work. Utilizing their own experiences to create ways to resist the system was required for this coping strategy since it was based upon knowledge of the company's IT systems and how to exploit the loopholes in ways there were invisible to management.

## 7.1.2 Flight-based coping strategies

The *flight-based coping strategies* reflected behaviors in which individuals coped with their lack of knowledge of how to handle specific problems by temporarily escaping work. These strategies could vary from passive to active behaviors. Interviews and observations revealed that call center agents utilized six strategies to escape from effectively solving perceived problems: Inward escape; physical escape; avoidance; blaming; pausing; and prioritizing. These coping strategies are discussed in the following paragraphs.

### 1. *Inward escape*

In this study, *inward escape* refers to an unconscious strategy of escaping from handling perceptions of increasing pressures at work. It is a more passive, individual coping behavior than fight-based, coping behavior. Lacking explicit knowledge of how to maintain performance levels, while facing an increasing number of tasks to be solved more efficiently (including sales interactions) resulted in increasing rates of sick leave over time. No other performance implications were found. Inward escape is a particularly ineffective coping strategy at the individual and organizational levels (given additional costs of recruiting and loss of performance during learning). An experienced agent explained how inward escape could be manifested:

There's too much pressure. If the demands are increasing, then there will be more examples of burnout, it has to do with what you can and cannot handle. Some are sellers and others are simply not. And those who cannot sell properly experience performance anxiety, that they must succeed but don't know how to, and that creates stress. There are no explicit strategies for how to deal with the increased stress. I didn't feel it either, I just turned on the computer one morning and I was supposed to do a deferral which I have done like 100,000 times and then suddenly I didn't know how to do it. I asked my colleague, he showed me, but I didn't recognize it. I just looked at the screen and the tears came. I was on a sick leave for a while (Agent, Case Gamma, November 2014).

This is one of many examples in which experienced agents, who were recruited for different skills than those required to carry out current tasks (see Chapter 7.2.1), escaped from handling their lack of knowledge of how to perform these tasks, while still reaching high performance levels. Long-term inward escape, driven by a lack of explicit strategies, resulted in sick leave when the agent could no longer cope with the daily work.



The agents were responsible for finding tools to manage stress, even though sick leave rates at Eon CS increased since it was first measured in 2010.<sup>67</sup> However, middle managers had an important function in (post-) supporting their agents in cases of burnout. The middle managers' role was rather complex, given that they were expected to provide mental support and motivate (push) the agents to perform well (even though their skills and knowledge might not be in line with the organization's changing performance strategy), while avoiding pushing them into burnout and sick leave.

## 2. *Physical escape*

In this study, *physical escape* refers to an individual behavior of being physically absent from work. This was a more active way to escape dealing with perceptions of increased stress by not performing well and escaping from not being able to meet all work demands. This coping strategy was specifically manifested by agents taking an additional day off after the sick-leave day (usually on a Friday), resulting in a higher rate of sick leave. This happened within all work groups. This coping strategy was a conscious behavior of actively choosing to temporarily escape from facing a problem at work. Both managers and agents explained that this coping strategy was viable since it was perceived to be rather easy to take time off from work, because the workload did not increase when the individual returned. Furthermore, agents lacked knowledge of how individual behavior affected performance at an aggregate level, but also for the prevailing organizational structure. Since a large number of agents primarily possessed general skills of call center work, were together in work groups, and were rarely solely responsible for carrying out specific tasks (Chapter 7.2.1), these components helped agents adopt a coping strategy based on being physically absent. Coping through physical escape did not affect the agent's performance, so was an effective strategy for the individual. However, physically escaping contributed to a greater workload on colleagues in the work group, since fewer agents than initially scheduled handled the same number of tasks. Individual absence from work was significantly less effective for the organization and impeded group-based performance. An agent explained the strategy:

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<sup>67</sup> The increasing rate of sick leave among agents and operational supports was discussed during meetings with top management, the division manager, the HR manager, and middle managers in 2012, 2013, and 2014.

There are many that are long-term sick leave here now [at Eon CS], I perceive them to be increasing all the time. You stay home an extra day if you feel a bit poor and if you're not able to perform. But we also know that not everything stands or falls apart if I'm not there. There are so many here and such a large circulation of people, so sometimes it feels like it doesn't matter if I'm here or not... you can't influence anything. But we also have the group-based targets. Not all agents get that what you do is important for the entire company (Agent, Case Beta, November 2014).

From the perspective of the middle managers, recurring physical escape was not considered an acceptable behavior, given the negative implications for group-based performance.

We still have problems with high rate of sick leave, but am I sick or tired? I perceive that many [agents] feel an ease of taking an extra day off, they don't feel responsible when so many people are doing exactly the same thing, they have no pile on the table when they return. The queues are gone when returning so it doesn't matter. It kind of becomes legitimate to take a few extra days [off], it's not even noticeable (Middle manager, Case Delta, November 2014).

Physically escaping as a way to cope with inability to handle job-related demands and problems was an effective strategy for the individual but less so for the group and the organization. It negatively influenced group-based efficiency (on-phone) and sick leave. Lacking a balance between private and working lives, and not possessing skills in line with the change of organizational strategy (toward sales) also encouraged agents to take additional time off from work.

### 3. *Avoidance*

The coping strategy of *avoidance* refers to behaviors in which individuals consciously escape from perceived pressures of work. Adopting this flight-based coping strategy assumes that individuals face certain pressures, but more actively avoid dealing with them. This was a conscious choice of passivity. For example, awareness of performing below expected levels (specifically regarding efficiency and sales, which was influenced by how targets were used; see Chapter 7.2.2) was handled by avoiding tracking individual statistics to reduce the stress caused by poor performance.

Most people know if they sell well or poorly, there's often a reason. I almost never look at my statistics, I don't think it helps to look at them all

the time, it stresses more than it helps, and then it will lock it [the ability to perform] completely (Agent, Case Delta, November 2014).

Another example of this coping strategy involved perceiving challenges in handling high workloads, which was managed by not looking at the number of calls waiting in the queue.

I rarely have the queue status visible [at the screen] because I get stressed of it. I take a call, it will take the time it takes, then I'll take the next... if it's 50 in the queue, yes, of course it stresses me out but I try to avoid it (Agent, Case Epsilon, November 2014).

Since low performance levels in relation to targets often generated increased stress levels and significantly lower motivation to be efficient (and sell), utilizing avoidance, when not performing in line with set targets, enabled agents to still perform well. Avoiding looking at their statistics fooled them into performing well, regardless of current performance levels. Therefore, agents maintained a moderate level of on-phone efficiency and sales. This informal behavior was effective for the individual agent in the short term, but less effective in the long term. Avoiding facing the problem of lacking knowledge of how to actually perform the work was a good temporary solution but caused higher levels of stress over time (if constantly performing below expectations). Management did judge the behavior itself, but noted the result of avoidance over a period of time in terms of performance implications.

#### *4. Blaming*

In this study, *blaming* refers to informal behaviors in which agents more actively placed responsibility for failure on others. Blaming not only was a coping strategy among call center agents when not performing in line with targets (regarding efficiency), but also further reinforced lower levels of individual on-phone efficiency. Agents utilizing this coping strategy generally did not improve their levels of efficiency. Blaming also was a means of escaping from dealing with learning how to properly carry out the work.

Blaming was primarily directed toward management (for not giving individuals a sufficient amount of time to perform their tasks) and the organization's IT systems (for being too slow, reducing their efficiency). Following is an example of an individual who lacked knowledge of how

the time should be spent on each task during a customer errand in order to reach the individual target:

The requirements are too high for the errand-times [on phone], we should definitely be given more time for being able to carry out all the things we are supposed to do during a call. We need to find the right facility, explaining different contract forms, sell wind power, and hopefully Securitas [sales agreement], verify e-mail address, mobile number, check if they want direct debit, e-invoice, create welcome text and so on. Many of those things you feel that you don't really have the time for (Agent, Case Epsilon, March 2012).

Although all of these components should be executed during a regular customer call, and were valid for all call center agents, it was evident that agents that performed below expected levels of efficiency utilized the coping strategy of blaming.

When I talk efficiency in my group... my group has a long way to go for reaching our targets in comparison to other groups, but it's not like our computers have a slower connection. It's always something else that one can blame, they usually blame something else for why they perform poorly that is not yourself. They want to find other reasons... I'm just "deal with it" (Middle manager, Case Epsilon, November 2014).

Escaping from learning how to efficiently carry out tasks (and reaching their targets) by blaming management (for having too high demands of the agents) was an effective coping strategy for the individual until their middle manager acted on the poor performance, resulting in lower material reward.<sup>68</sup> However, this coping strategy was considerably less effective for the work group and the organization. Escaping from dealing with low performance levels by blaming others impeded the organization's ability to reach aggregated targets (negative influence on group-based on-phone efficiency).

### 5. *Pausing*

This flight-based coping strategy is based on an informal behavior of taking micro-pauses (short additional breaks) from work during scheduled time. *Pausing* is a routine-deviant, more active behavior used by a large number of agents to sometimes escape from work. Reasons for escaping by these micro-pauses included lacking skills for handling an occasionally

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<sup>68</sup> Blaming was also included in the lowest degree in the performance scale within the evaluation tool used in performance appraisals (Table 14, Chapter 6.1.2).

high work pace, different types of customers (with different attitudes and moods), and perceptions of too few breaks during green time (in response to being bereft to carry out administrative tasks, where the work pace was slower). Other reasons included perceived difficulties in solving problems during the workday, failing to include many components into each customer interaction, or poor sales performance. The basic feature that these reasons had in common was a lack of knowledge of how to carry out the work in accordance with requirements.

The majority of agents who used this coping strategy were employed full time, with some experience at call center work (generally excluding temporary agents or those with long experience). These occasional escapes from work were carried out either alone (such as looking at social media, checking news sites, shopping online, playing games on the cell phone, walking to the toilet, or getting water or coffee) or collectively with colleagues. Taking pauses with colleagues generally involved interacting through the company's instant messenger (chat) or by talking to them face-to-face. Both types of pauses, but particularly collective ones, were seen by management and colleagues.<sup>69</sup>

You don't sit and just look straight out into the air, one might glance through the news, pick up the phone real quick, check Aftonbladet, Facebook. Maybe you work actively 75 percent of the time or something like that? It depends a little on the day, and type of calls (Agent, Case Epsilon, November 2014).

Table 17 further highlights how escaping behavior through micro-pauses was performed in relation to an agent's schedule. These behaviors primarily were revealed through close observations of the agents over time.<sup>70</sup>

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<sup>69</sup> Behavior at the scheduled breaks (referred to as "legal breaks") differed from the informal breaks, in which they were more often utilized for interacting with colleagues, rather than spending it on their own.

<sup>70</sup> The differences between what these agents were scheduled to do (Table 13, Chapter 5.2.3.) and what they actually did were rather significant in terms of agents' escaping through micro-pauses.

**Table 17: A representative example of escaping behaviors through micro-pauses during a regular workday in the case organization**

Time	Activity and description	Purpose
7:48-8:05	<i>Scheduled information quarter:</i> Arriving late to work, talking to the table neighbor about the weekend, starting computer and logging into systems	Being social with colleagues, starting IT systems, getting a cup of coffee
8:05-9:00	<i>Sitting by the desk:</i> Answering customer inquiries on phone (green time), pausing with table neighbor during wrap-up time and between calls; checking Facebook, news and shopping websites during wrap-up time.	Working according to schedule, escaping by pausing between tasks by doing personal activities at work
9:00-9:18	<i>Scheduled break:</i> Agents drink coffee in the kitchen, sitting in dining areas, talking to other agents, visiting restrooms.	Interacting with colleagues, prolonged pause from phone
9:18-10:30	<i>Sitting by the desk:</i> Answering customer inquiries and solving errands on phone (green time). Small talk (pausing) with table neighbor during wrap-up time and between calls; checking Facebook, news and shopping websites during wrap-up time.	Working according to schedule, escaping by pausing between tasks, doing personal activities at work
10:30-11:15	<i>Sitting by the desk:</i> Doing administrative work, answering e-mails. Talking to colleagues about a problem and moving over to personal issues.	Working according to schedule, escaping by pausing from work
11:15-12:00	<i>Scheduled lunch:</i> Eating in dining area, seated among colleagues in the group, talking to colleagues	Pause from work
12:00-13:00	<i>Sitting by the desk:</i> Answering customer inquiries and solving errands on phone (green time). Pausing during wrap-up time.	Working according to schedule, escaping by pausing between tasks
13:00-14:00	<i>Sitting by the desk:</i> Carrying out administrative work, answering e-mails. Talking to other agents about a problem and moving over to personal issues between and/or during errands, listening to music	Working according to schedule, escaping by temporary pausing from work
14:00-14:16	<i>Scheduled break:</i> Agents drink coffee in the kitchen, sitting on the office sofa or in the dining area, talking to other agents, visiting restrooms.	Interacting with colleagues, prolonged pause from phone
14:16-16:30	<i>Sitting by the desk:</i> Answering customer inquiries and solving errands on phone (green time). Small talk (pausing) with table neighbor during wrap-up time; checking Facebook, news and shopping websites between/during work, taking up an admin. errand instead of solving an additional phone errand in the end of the day.	Working according to schedule, escaping by pausing from work, long wrap-up time during the last 10 minutes since they don't want to initiate a new call that can prolong their workday.

Moreover, since agents had different reasons for pausing, the amount and the length of pausing also varied, as well as over time. Escaping through micro-pauses, alone or collectively, had several impacts upon performance. First, given that these pauses were most often carried out during agents' scheduled time to wrap up calls, this coping strategy primarily impeded levels of on-phone efficiency (in the short term). Pausing and/or interacting with a colleague instead of taking a new call extended the wrap-up time, while impeding their rate of calls solved per hour (Table 17). However, whether the performance decline was marginal or more substantial, was determined by the amount and the length of these

pauses (measured in minutes) during a workday. This was influenced by the culture in the work group (see joking and having fun; Chapter 7.2.3).

Usually I take a break during wrap-up, but that is also affected in a bad way, the wrap-up will suffer. You are measured there as well and the wrap-up is not supposed to be too long either. It will come up at the follow-up meetings. They [the managers] keep track of what we do since we are measured everywhere (Agent, Case Delta, November 2014).

We usually go together for pausing. If you have e-mail or so, then it's up to you if you want bad or good performance. If you take a cup of coffee during wrap-up, of course your wrap-up times get impeded (Agent, Case Delta, November 2014).

Second, individual and collective pauses were also carried out during scheduled time for solving administrative errands and problems (such as answering e-mails), which negatively affected individuals' administrative efficiency (Table 17). A third impact of this coping strategy was an impaired ability to properly perform work in line with (updated) rules and routines. Since pauses were sometimes conducted during the information quarter (the first 15 minutes of the work day), time for reading information in the company's knowledge base (aimed at helping agents in their work) was not utilized.

Some [agents] use the quarter [of information] to talk to each other, drinking coffee, and such. They consider it as time off work instead. They can be here at 7:30 and log into the systems but they sit and talk to colleagues instead of reading at the KB [Knowledge Base] and update themselves. And they ask themselves "How am I supposed to keep up with new information? One is not using the time to do what you actually are scheduled to do. A spontaneous figure is that perhaps 30 percent [of the agents] uses the information quarter to what it's intended for (Middle manager, Case Gamma, November 2013).

Fourth, pauses also contributed to a lower risk of becoming sick over time (leading to lower rates of sick leave) by not fully managing to work in the call center environment.

Consequently, occasionally escaping from work by taking micro-pauses was a less effective way to cope (given impaired performance levels). However, most agents were aware of this impact (implying that not being motivated by targets and incentives influenced this coping strategy; see Chapter 7.2.2). Whereas some agents constantly tried to restrict the length

of their pauses, others did not care about negative performance impacts, since they considered themselves in need of pausing now and then. However, it was also implied that this coping strategy was more effective in the long term regarding sick leave, given that the absence of breaks and lack of knowledge of how to properly carry out the work resulted in exhaustion. This coping strategy also influenced organizational performance depending on the significance of impact upon individual performance and how often these pauses were carried out. For example, interviews and observations showed a tendency for the overall number of micro-pauses among agents increased between 2013 and 2014 as a result of the increased pace of work (such as developing more flexible systems that could schedule an agent to answer an e-mail if there were no queues on the phone, resulting in fewer natural breaks between calls) but also as a result of new knowledge requirements introduced in the organization (Chapter 7.2.1). Creating and utilizing micro-pauses as an individual coping strategy influenced organizational effectiveness.

You gladly take a small break, especially during the last two years when it [the work] has become tougher. Rather than taking the next call, despite there's a queue, you instead choose to turn to the table neighbor and talk for a few minutes (Agent, Case Epsilon, November 2014).

Furthermore, middle managers generally accepted these micro-pauses (although to varying degrees), as long as they were sporadic and did not influence agents' performance levels more than marginally. By contrast, escaping by utilizing pauses in a more systematic way (such as by often taking longer breaks during scheduled time) and significantly impeding performance was considered behavior outside the rules of work.

One can certainly take 2–3 minutes during the wrap-up if it's a high pace on phone. Everyone does it. It's accepted, as long it's on a reasonable level. If you go and get a cup of coffee and meet the manager in the stairs, it's not like "Aha! You are taking a break!" But if I would be gone for 30 minutes, the manager would have ordered me to stop (Agent, Case Beta, November 2014).

The distinction between understanding pausing as an organizational behavior or as misbehavior was determined by the middle managers, guided by its impact on performance.



## 6. *Prioritizing*

This flight-based coping strategy represented making a conscious, active choice of *prioritizing* to reach certain targets rather than others. This coping strategy was an informal behavior to flee from dealing with lack of knowledge of how to perform all parts of the call center work according to requirements. This was manifested by failing to reach certain targets. More specifically, agents' prioritizing was based on allocating their time when performing tasks to increasing the possibility to reach certain targets. Priorities were made between: Efficiency and customer satisfaction; sales and customer satisfaction; sales, efficiency, and customer satisfaction; and efficiency and problem-solving. For example, choosing to prioritize customer satisfaction was required more time-consuming effort, which reduced the ability to be efficient on-phone. However, agents adopting this coping strategy generally carried out their customer interactions at a relatively high speed (such as by leaving out certain steps of the call) that could contribute to lower quality and result in lower levels of satisfaction (for further description of contradictory targets, see Chapter 7.2.2).

I take the time with customers to listen to them so I can make them satisfied without stressing them too much, and I inform on the things they need to know of. The customer shouldn't have to feel stressed, many are annoyed if they've been in a queue for a long time and you cannot rush them. The Customer Satisfaction Index might get affected otherwise. If you are a bit too quick while talking, and you push the customer a little too much, that will show in the Customer Satisfaction Index (Agent, Case Beta, November 2014).

Given that these agents considered their targets to be contradictory, time in relation to prioritizing is a scarce resource that must be managed.

Furthermore, the order of priority regarding these targets was mainly influenced by each agent's opinion of what was important (see Chapters 7.2.2 and 7.2.3 on prioritizing certain sales products over others) and the goal-setting and incentive structures, which were the objectives that provided the best monetary dividends. Management emphasized the latter:

There is also a ranking between the metrics, they [the top management] watches the errand time on phone and the wrap-up time this year. If I would get stressed over that, I probably wouldn't put extra two minutes in listening to if Agda is having a bad day. For me, I rather take the two

minutes extra so the customer gets satisfied (Agent, Case Epsilon, December 2012).

Agents with several months to years of experience who used this coping strategy most often prioritized satisfying customers, whereas newer agents prioritized efficiency and (later on, in line with the change of organizational focus) higher sales rates. Very few agents prioritized solving problems.

There has been a major focus on the total [telephone] errand-time this year. And since people [agents] are getting stressed over it [to achieve the targets in on-phone errand-time], then the Customer Satisfaction Index instead becomes worse (Agent, Case Beta, December 2012).

Coping by prioritizing certain targets directly affected performance, in which there was a positive impact on prioritized metrics (customer satisfaction, on-phone efficiency, sales) and a negative impact on lower prioritized goals (problem-solving, on-phone efficiency, sales). Prioritizing was effective for the individual in the short term but ineffective in the long term, given that failing to reach the targets for all tasks over a working year impeded monetary rewards (based on reached levels within all targets). In addition, this coping strategy was ineffective at the organizational level, since there were tendencies for agents to prioritize equally, resulting in some targets not being reached at the organizational level over a year (on-phone efficiency in 2012, 2013, and 2014, and e-mail efficiency). Failing to reach these targets also highlighted that handling errands in a time-efficient manner was not always successful. In other words, prioritizing certain goals and tasks did not necessarily result in reaching those targets.

Although prioritizing represented behaviors in which agents escaped from solving their lack of knowledge of how to reach all their goals, middle managers primarily accepted it. This acceptance was based on the fact that prioritizing implied performance improvement within some targets in the organization. However, management tried to encourage all agents to improve their overall performance levels to reach their expected levels of performance over a year, which would also benefit performance levels at the group level.

The agents choose to focus only on certain targets in order to manage it [the work]. And then they start to believe that it's only the environmental metrics or whatever they choose that need to be achieved, and when they reach those, they believe they are safe. But they realize during the

evaluation meeting that they also have other targets, but it's a bit late then (Middle manager, Case Beta, November 2013).

### 7.1.3 Forgo-based coping strategies

The *forgo-based coping strategies* reflects a behavior in which individuals, with varying degrees of consciousness, coped with their lack of knowledge of how to perform their work by giving up. In comparison to the fight- (in which individuals were fighting their ignorance) or flight-based strategies (in which individuals temporarily escaped solving their problems), forgo-based coping did not handle ignorance or problems. The call center agents utilized one main forgo-based coping strategy; namely resignation. Manifestations of resignation and the impacts on performance will be discussed in the following paragraph.

#### *Resignation*

In this study, *resignation* refers to a behavior in which individuals gave up (in thoughts and action), while remaining at the job. More specifically, resignation is a constant low motivation to handle perceived problems. This was generated by lacking knowledge of how to carry out all parts of the call center work, in line with requirements. However, coping through resignation did not generally imply making an active choice. Instead, it was represented by agents' capitulation and acceptance that they would not be able to fully learn the job. Coping through resignation generally did imply awareness (which varied between agents) of their low and decreasing willingness and effort to handle perceptions of increasing demands over time. Agents with long work experience at Eon CS utilized this resignation coping strategy, which prevailed in all work groups.

There are few agents that are so extreme, that have given up completely, but it's approximately 10 percent in the entire house (Middle manager, Case Beta, November 2014).

Moreover, the change in organizational strategy to increase focus on reaching sales goals, and high levels of efficiency, particularly spurred agents to cope with resigning behaviors. This resulted in new ways of working for (tenured) agents who were initially hired for different skills (see Chapter 7.2.1).

In the past, you received the errand and solved it until it was finished, it's no longer like that. Now you send it further and have no control of

whether the customer received help or not, and if it was resolved at all. We didn't have any errand-time... that was the reason why I searched for job outside call centers... and now I'm back on the errand-time again, we are measured at everything (Agent [14 years], Case Epsilon, November 2014).

Furthermore, resignation was manifested primarily through a constant low willingness to reach targets and perform well overall. Targets were most often perceived as obstacles (also referred to as *a whip*), rather than incentives for performance (Chapter 7.2.2). Agents often used expressions such as *acting like a robot* (an agent who should neither think nor feel, but just behave as they were told), and *don't act, just do*. This reflected their low motivation to learn how to work in line with requirements. Not bothering to follow valid rules (such as following old routines that they preferred) or system procedures (such as not being logged into the right queue) manifested other tendencies of resignation, which could result in improper execution and misleading performance data.

Now one has entered the age where one is really tired of chasing [targets] all the time, I don't have the fiery power to chase it [performance] like crazy anymore and being fast, and then the calls are more time-consuming for me. I can't redo myself, which is something they [the managers] need to accept, otherwise I will have to quit (Agent [8,5 years], Case Beta, November 2014).

I don't think that anyone who has been here a long time is as driven as a new one [agent]. I can feel that I can't sell as much as I might be able to do. All the time: Go, go, go... finally there will be a dip where you can't do anything more. And I understand those who have been here for 8–10 years that feel: Damn, why am I here? (Agent [1,5 years], Case Delta, November 2014).

Not surprisingly, resignation influenced performance in several ways. First, since it implied a low desire to perform well in areas perceived as challenging, the coping strategy negatively affected both individual efficiency levels on-phone and sales rates. However, this coping strategy also had negative effects on performance at the group level, since these agents had significantly lower performance levels than those for which other agents in the same work group could compensate (particularly evident regarding on-phone efficiency at the group level, such as Case Gamma and Case Epsilon during 2014). However, agents' resignation against handle lacking knowledge of how to carry out all parts of the work implied they maintained abilities to satisfy customers and solve more complex errands (excluding efficient problem-solving).

Those [agents] who have reached their best-before date are still really good with the customers! So being efficient does absolutely not require the same things as gaining high customer satisfaction (Middle manager, Case Beta, November 2014).

Utilizing this coping strategy was effective for the individual, in terms of receiving a salary while employed, even though they put out consistently low efforts at learning to fully carry out the work and perform well. However, it was a less effective strategy in terms of gaining additional monetary rewards (bonuses). Given the overall low performance levels regarding efficiency and sales for which others could not always compensate, the coping strategy of resignation was also certainly not effective for either the group or the organization.

Middle managers had a significant role in relation to this coping strategy. More specifically, the middle managers tried to motivate (push) these agents to occasionally perform well. For example, some of these agents improved their efficiency, especially when the middle manager was listening to a customer call and physically present. These agents then performed better under direct supervision, but had generally given up their will to learn how to do so on a constant basis.

Management needs to be here physically for the work to flow well. An important part is that managers not only triggers people to perform but also that they basically are there (Middle manager, Case Delta, November 2014).

What affects their willingness to be efficient on-phone differ but basically that they feel needed. The managerial presence is therefore crucial (Middle manager, Case Delta, November 2014).

In addition, middle managers tried to actively support or make agents search for another jobs outside the case organization. However, management often referred to these agents as *saturated*, *vegetables*, or *victims*.

They don't want to be here. Some of them like their work group and Eon CS but they cannot handle working as customer service agent anymore. The one who has been here the longest has been here for 12 years. I will not say that the rotation here is too low but compared to how many we have hired, then it's low. One has become saturated and remained too long, it's that simple (Middle manager, Case Beta, November 2013).

Those who have given up, it's about actively making them to search for other things, I've succeeded with one [agent] at least. It's about they themselves, how they feel, etc. (Middle manager, Case Beta, November 2014).

Given the overall negative impacts on performance, adopting the coping strategy of resignation represented unacceptable behavior outside the rules of work, despite remaining at performance levels in other performance areas.

### **7.1.4 Summary of the individual element: Coping**

These empirical manifestations showed that call center agents at Eon CS adopted different coping strategies in the absence of an appropriate level and type of knowledge to fully carry out their work. Lack of appropriate knowledge was manifested in agents' inability to maintain high levels of performance within different metrics over time, resulting in failure to reach all targets. There were a variety of strategies for coping with this knowledge gap. Whereas some strategies represented behaviors in which agents fought for (knowledge sharing) or against (resistance) learning how to handle perceived problems, other strategies reflected behaviors of temporary escape (flight) from managing the lack of knowledge. These agents temporarily escaped from learning how to fully perform their work. Interviews and observations revealed that agents also utilized a coping strategy by giving up their willingness to handle perceived work problems (forgo-based coping), which was manifested through resignation.

In addition, the empirical manifestations showed that agents with varying degrees of awareness, and passive or active behaviors, utilized different coping strategies to solve or not solve perceived problems. Since the various coping strategies affected their learning process, the time required for gaining knowledge and learning their work also varied. Also, given that agents' subjective perceptions of a problem were influenced by changing conditions over the short- or long-term period (such as fluctuations of work pace, variation of problems, or change of organizational focus), the scope and adoption of each strategy could change over the short or long term (except for resignation). Different coping strategies could also be adopted between colleagues in the same work group at the same time. Moreover, agents' subjective perceptions of time were especially important for understanding certain coping strategies (such as internal knowledge sharing, resistance, pausing, or prioritizing),

further establishing the variation in the use of these strategies. It also highlights the differences between agents' perceptions of time (utilizing the time at work mainly for their own benefit) and managerial perceptions (coordinating resources and efficiently using time to benefit the company) in this type of organizational setting.

Moreover, although these individual coping strategies primarily influenced individual performance levels, some coping strategies also influenced performance at the group level over time (physical escape, resignation). Certain individual coping strategies were also performed collectively (knowledge sharing, pausing), which also influenced the interacting agent's performance. Whether or not the coping strategies were effective varied, depending on the perspective, such as an individual, group or organizational level, or a short- or long-term perspective.

Furthermore, it was also clear that the organizational strategy for managing, controlling, and/or suppressing these coping strategies was primarily assigned to the middle managers. They had authority to handle their specific work group according to their needs, adapted to each individual and the work group as a unit:

Everyone is allowed to use their own ways to execute leadership. You are allowed to use your own kind of leadership, there are clear frameworks but with a stretch in the middle. I like to stretch it (Middle manager, Case Epsilon, February 2012).

However, middle managers tended to carry out similar actions to support and motivate agents, with varying levels of acceptance. Interviews and observations showed that their role was specifically based on motivating and spurring agents to perform well overall and curb or eliminate certain (observable) organizational misbehaviors (such as resistance, physical escape, or resignation). Rather than helping agents fully learn their jobs, the managers' roles were primarily focused on the effects of this knowledge gap to avoid negative performance effects from utilizing coping strategies.

## 7.2 The interpersonal elements

In addition to the individual element of coping, certain interpersonal elements were also important for performance in this call center context. In this study, *interpersonal elements* refers to elements that involve relationships between people, which are influenced by company-, workplace-, and other group-based elements. Based on empirical interviews and observations, contextual, control-based, and cultural elements were important to understand performance in this organizational setting. This chapter will present each interpersonal element and its sub-elements in relation to their impact on performance.

### 7.2.1 Contextual elements: Matching people and tasks

Interviews and observations revealed that certain contextual elements were important to understand performance drivers in this call center context. More specifically, elements based on the workplace and the nature of the call center work in regard to the strategy utilized for matching people and work tasks was important to further our knowledge of performance drivers. Contextual elements primarily manifested through the strategy of enabling group-based knowledge to spur overall performance. Within this interpersonal element, the company, workplace, and work group primarily mattered for performance.

#### *Group-based knowledge strategy*

Knowledge, experience, and skills among agents at Eon CS must be organized to ensure that all customer errands and tasks carried out in this organization can be resolved as effectively as possible. Management selected a strategy of organizing work groups to hold the knowledge, experience, and skills needed to solve all tasks within the group. These work groups were mostly isolated units with a low level of collaboration between them. Operating through this group-based knowledge strategy is particularly based on two elements. First, the company utilizes a skills strategy that is primarily aimed at enabling agents to possess a large set of general skills that are initially learned during a short training period when hired, but also through carrying out the work over time. General skills are used for solving a range of various issues on customers' requests (descriptions of tasks and issues are further presented in Chapter 5.2.2).



Eon [CS] has begun to make more use of skills in recent years, although perhaps more in the direction toward that as many people as possible should have as many skills as possible. It might get cheaper [for the organization], I don't know, instead of having pure specialist groups I mean (Agent, Case Gamma, April 2012).

We know a little about a lot of things, but not much about anything really (Agent, Case Gamma, December 2012).

This group-based knowledge strategy also implies that new agents generally lack specialized skills required for solving more complex problems, such as helping customers regarding questions about renewable energy, technical support, and compensation for power damage. However, it was necessary in this type of organization to also operate with agents with longer experience at various types of call center work or certain specialized skills who can contribute with more knowledge of how to solve problems between individuals and within the work group.

Those [agents] who have been here [at Eon CS] for a long time are probably more problem-solvers and skilled in those kinds of issues, more advanced things, they know a lot (Agent, Case Delta, November 2014).

If one has worked here for a while, one has an ease of resolving more difficult or tricky issues, and is more likely to be fast at admin. errands. I remember it myself, when I was new, everything took a lot longer time to solve, one was uncertain and had to ask others (Agent, Case Beta, November 2014).

Second, knowledge must be shared among agents in a work group to take full advantage of the diversity of knowledge, experiences and skills to enable resolution of all errands and problems within a group. This group-based knowledge strategy requires colleagues to help each other when a less knowledgeable agent needed support (especially since the operational support was often not perceived as present), which was mainly carried out on an informal basis (the coping strategy of knowledge sharing; Chapter 7.1.1).

We get a lot of assignments and we have a broad range of skills within the group. It's not a severe thing to go to someone [in the group] and ask. We help each other quite much within the group and take advantage of each other's knowledge (Agent, Case Delta, December 2012).

One [the agents] generally will find the skills and competencies [to solve various tasks] in the group and does therefore not have the need, from a

competency perspective, to search for support beyond the group. They are helping each other out. It's a low level of cooperation with others (Middle manager, Case Beta, December 2012).

In addition, less experienced agents knew which specific agent to turn to for help to get answers, which facilitated the sharing of knowledge in terms of the time spent on helping.

All of us are skilled at different things, you know pretty well, now it's this kind of problem and she is good at that, you go to her. We have specialists in the group even though they don't have any titles, kind of informal specialists (Agent, Case Delta, November 2014).

One should try to help each other as much as possible because we have different skills. You know exactly who to turn to, everyone knows something specific such as credit issues, technical stuff... we learn a lot from each other (Agent, Case Beta, November 2014).

This group-based knowledge strategy also compensated for performance variations in each work group. This contextual element was important for performing well within each of the utilized metrics at the group level.

Agents in my group have everything. I think those who perform weak in terms of efficiency instead are very good at something else, like admin. or to satisfy customers. These agents' output is also compensated by the hyper-efficient ones, which in turn might perform weaker on the other side. I have many high-performers, but two or three agents will never be efficient or reach their targets regardless of how we work, and the others [in the group] need to compensate in order to make the big picture look good (Middle manager, Case Beta, November 2014).

More specifically, middle managers and agents clearly understood that newly hired agents possessing (only) general overall skills performed well within sales, while keeping high levels of on-phone efficiency. On the other hand, they were generally not as skilled or fast at solving complex errands or making customers satisfied.

New agents are good at sales and efficiency because they are so triggered at this new job. But if one has been here [at Eon CS] during a short period of time, then it's usually the Customer Satisfaction Index that you need to improve in the beginning, it's not always that you reach the highest score directly, it requires a lot and that may take time to grasp, because the customer has to feel confidence (Agent, Case Delta, November 2014).

The younger ones are so much more alert. And they have a requirement to sell so darn much and that helps. And they are faster, the maybe risk more; it's supposed to go fast. The younger ones clearly win when it comes to on-phone, wrap-up time and sales performance (Agent, Case Beta, November 2014).

Managers and agents also clearly understood that employees with more experience, who generally possessed more specialized skills within certain areas of call center work, were efficient and proficient at solving complex errands and more skilled at making customers satisfied, given their experience of interacting with various customers. On the other hand, these agents were generally less skilled at performing well within sales and being efficient when solving regular customer errands on-phone.

I'm more like "it will take the time it takes", and I check, after the call, during the wrap-up, if things fit together and if I really got it right rather than to just let it be. You feel secure in your work if you know what you are doing. So I'm not fast on phone or reach short errand times. But I know a lot (Agent, Case Gamma, November 2014).

A new agent has difficulties is solving more tricky issues, such as administrative errands, since they don't have the knowledge or experience, you need to work for a few years (Agent, Case Beta, November 2014).

Based on this description, organizing work groups with agents possessing complementary skills and knowledge bases implied beneficial conditions for performing well at the group level within several performance metrics. However, this strategy did not always succeed at a group level, nor did it spur performance among all individuals in the group. For example, knowledge-sharing individuals' short-term efficiency levels on-phone were impaired at the expense of efficiency among the knowledge-seeking agents (Chapter 7.1.1). This performance impact could not be compensated for in all work groups (the coping strategy of resignation; Chapter 7.1.3).

I have three new agents that ask me [for help] all the time, I can't work especially efficient then. Since I've been working here [at Eon CS] so long and they sit close to me, they rather ask me than calling the operational support. Of course it takes time. It's devastating during the salary discussion because I know that I maybe would have had better statistic otherwise. They [the managers] only follow the statistics, not really if I am proficient or not. That I help others a lot is nothing that can be measured

so I don't receive anything for that, rather the opposite (Agent, Case Epsilon, November 2014).

An additional example that the company's knowledge strategy did not always benefit certain individuals' performance levels could be explained in relation to an organizational change implemented during 2013/early 2014. The general understanding of how experience, and the amount and level of knowledge influenced performance in this organizational setting was further strengthened after Eon CS changed from primarily a caring customer service organization into a selling customer support one. This change was implemented as a response to a reduced number of incoming customer calls. The nature of the work not only placed a considerably higher emphasis on sales (which also changed the company's recruitment profile), but also focused less on customer satisfaction (yet was contested by some managers). This impact was further verified in empirical manifestations, since managers prioritized certain targets above others (further described in relation to control; Chapter 7.2.2.). Many experienced agents considered that previously desirable service and advisory skills were downplayed in favor of sales skills that were more in line with the current business. However, the company's knowledge strategy for the work groups remained the same. Given that agents tended to remain with Eon CS for approximately six years (Chapter 5.2.2), the opinion that two types of agents working in the organization existed were strengthened. One camp comprised agents employed on the former work emphasis, whereas the other comprised agents recruited for the current focus. Both middle managers and agents shared perceptions that the first camp might not longer fit into the business. This not only downplayed the importance of experience and knowledge, but also the abilities to solve complex issues.

We do have a great experience from customer care but we also start getting a category of people who have experience of what we want to do now: being proactive, efficient, good at sales, that work a little bit faster. You could say that we have two camps (Middle manager, Case Epsilon, November 2014).

The main challenge for all managers here [at Eon CS] is that we have many agents who have been here for a long time and that don't quite fit into the organization. Especially after the summer [of 2014] it has become much more focus on sales (Middle manager, Case Beta, November 2014).

Selling is something you have to work with all the time because that did not exist here before. When I started working here, and that's not so long ago, it didn't exist. Sales have increased more recently, and it's something that those who have worked here for a long time need to struggle with. Back then it was more of a customer service and now we are a sales support. It's clear on what the company chooses to prioritize. I think the focus on sales will increase even more (Agent, Case Delta, November 2014).

The perception that one camp of agents suddenly did not fit into the company was also based on a difficulty of learning how to succeed with sales in relation to the call center work.

We need to find a selling side within all agents. But we also need to reduce the errand times, it's like a part of our DNA, and to be able to succeed with that while reaching more sales. And that takes a really long time to change. You could say that about 50–60 percent of our agents basically are not sales people, and of which perhaps 25 percent might improve, but where 30 percent are totally off track. They are recruited on completely different criteria so they can never be good salespersons (Middle manager, November 2014).

Before we should satisfy the customers, and today selling is the main priority. Me and a couple of the other old foxes would never have a chance of getting a job here today because they search for sales skills. They can never teach us old dogs to sit, we don't have the same kind of thinking and can therefore not sell equally well (Agent, Case Beta, November 2014).

The organizational change enlarged the distinction between categories of agents, which did not favor experienced agents, their performance (since it influenced the coping strategy of pausing; Chapter 7.1.2), or their level of compensation (Chapter 7.2.2) if they didn't learn how succeed at sales.

A final impact on performance by organizing people according to group-based knowledge concerns the negative influence of increasing sick leave rates among experienced agents, as a result of not being able to handle new performance requirements (see inward and physical escape; Chapter 7.1.2).

It's more stress and controlling activities now, there are so many of us that are stressed, it wasn't like that two years ago. It [the rate of sick leave] has increased really fast and it's still increasing in line with the enhanced demands on sales. You shall do it, you must, there are no other choices.

It's dangerous to have such high demands overall (Agent, Case Gamma, November 2014).

Also I have agents in my group that are employed on premises when we had a completely different organization, the caring operations, and it's still quite difficult to make them apply a permanent selling approach. You have to be there and poke all the time. You can't get away with not offering things anymore, you have to do it in each call, and some find it really hard and can't handle it (Middle manager, November 2014).

### *Summary of contextual elements*

Matching people and tasks according to a strategy in which each work group held appropriate skills, knowledge, and experience to solve all types of issues in the group benefited problem-solving at the individual and group levels, given that new agents learned from more experienced ones. This strategy generated a larger knowledge base within the group of how to deal with various issues and problems in these call centers. This contextual element also implied a positive influence on group-based performance regarding sales and customer satisfaction, based on the logic that individuals within a work group compensated for each other's performance levels (with some variations).

However, matching people and tasks according to this strategy also generated lower (or higher) efficiency levels on-phone at the individual level, given varying implications from informally and internally sharing knowledge in the work group (Chapter 7.1.1). The negative impact regarding efficiency was not always compensated for in the work group, resulting in lower group-based on-phone efficiency. In addition, the changing nature of work while keeping the same knowledge-strategy in the work groups also resulted in a higher rate of sick leave among agents who could not manage these new requirements (Chapter 7.1.2, inward and physical escape). The degree of impact on both individual- and group-based performance in each type and category of performance was based on the specific organization of knowledge, skills, and experience in each work group. It was very rare that agents were skilled within all parts of their work. The rate of experienced agents versus less experienced ones working in each group, and their abilities to compensate for each other's performance, influenced group-based performance. This notion further emphasizes the different challenges regarding experience, skills, knowledge, and performance that each middle manager faced and was required to handle in the respective work groups. Although they were not hired for sales skills, experienced agents were still required to reach sales

targets to receive certain monetary rewards based on overall performance levels. The middle managers' role was complex, given the importance of spurring performance yet avoiding pushing agents too hard, leading them into sick leave or escaping behavior.

Moreover, given the requirement and encouragement for informal knowledge-sharing activities (even though helpfulness was not rewarded or accounted for at evaluation meetings, since it was not measured), this organizational strategy for composing work groups appeared to reach moderate/high group-based performance levels significantly above individual performance levels (that might have been reached by organizing pure skills groups that can motivate significantly higher achievements among colleagues within that skills area). The empirical findings revealed that the contextual element influenced the individual element of coping in terms of which coping strategy agents adopted.

### **7.2.2 Functional or dysfunctional control: Appropriate means to an end? Goal-setting structure and incentives**

Interviews and observations revealed that certain elements based on control were significant in understanding performance in this organizational setting. The case company's goal-setting and incentive structure was important in terms of the logic for setting targets, communicating and reaching goals, and rewarding performance. The goal-setting and incentive structure was important for understanding performance, primarily based on three sub-elements highlighting: The use of targets and incentives to spur performance; performance conflicts between internal performance metrics; and performance conflicts between internal targets and company vision (short- versus long-term perspective). These enhanced understanding of how this interpersonal element influenced performance. The company and the workplace primarily mattered for performance regarding this interpersonal element.

#### *1. Using targets and incentives to spur performance*

This organizational setting was primarily governed by reaching targets, which applied at the central, divisional, and group levels, and was seen in the use of performance metrics (Chapter 6.1). Targets were given greater focus over time among top management and middle managers. From the perspective of the managers, the use of targets represents the best and only method for motivating agents to reach high performance levels.

When I started here two years ago, this was a whole new world. I perceived it as quite square-minded. I thought it was difficult: how can you evaluate a worker by seconds? It's black or white. We basically measure everything and we can do it in a lot of different levels. We use targets and metrics for measuring the agents' efficiency, both in terms of salary and wage criteria, but we also use them for the incentives (Division manager, November 2012).

Here we control on detailed and individual levels, where the people are the tools (HR manager, February 2014).

However, controlling performance through targets and an incentive structure was based on the assumption that all agents can achieve and work toward reaching the same type of targets within a variety of tasks (since targets exist for explicit and implicit parts of agents' work activities). This performance-management system was also based on the assumption that agents were purely instrumental and that linking goals to monetary rewards is a well-functioning system for motivating agents to perform well. However, whether this goal structure was functional or dysfunctional varied among agents. First, the goal-setting structure and the incentive system appeared functional in spurring performance, especially for temporary agents who wanted to receive tenure (during the initial working phase) and agents with limited opportunities for development and career prospects inside or outside the organization, given low hierarchy and levels of management.

The Manpower employees [temporary agents] struggle for their lives and sell sell sell, and when they get employed at Eon, their sales impede, and very quickly too. But the pressure on the hired is too hard. They are usually more efficient on the phone than another who has been here for a long time too, but that's what they have been taught, they are more focused on the sales in a different way (Agent, Case Beta, November 2014).

You need the rewards, because there is unfortunately no development here. You are a customer agent, and we have the operational supports and six middle managers, and when one position gets vacant... there are 120 agents (Middle manager, Case Gamma, November 2013).

Second, controlling performance through this performance-management system was also less functional for other agents, primarily due to five reasons. (1) Agents with experience received lower pay than newly employed ones and had lower sales performance (Chapter 7.2.1). It was clear that the organization prioritized certain goals above others (Chapter



7.2.2, paragraph 2). The misalignment between the organizational mission and these agents' skills was also represented in the agents' salaries.

The new ones from Manpower now have higher entrance salary than me who have worked here for seven years, and that clearly hurts. And it's about the sales, they are better at selling. Because we old ones who may focus more on being customer friendly spend time on the customer and complete the errands, but that's not what Eon [CS] wants anymore, they want the selling people, end of story (Agent, Case Beta, November 2014).

There have been many private conversations where people have been really upset. The bottom line is when you sit and talk to them "Ok, it's not worth anything that I've been here a long time and that I have long experience? No, we value performance"... Maybe they have done less than they should, otherwise their salary would have been better (Middle manager, Case Beta, November 2014).

(2) This goal-setting structure and incentive system was also less functional since bonuses were divided between agents in a work group. Based on this practice, agents perceived that they were not rewarded well enough for performing exceptionally well compared to expected levels, previous performance levels, and colleagues' performance levels. This understanding was shared among certain agents, middle managers, and top managers.

If you perform well you get a tiny better wage increase [compared to performing poorly] but not a big difference. I don't feel that someone who is really really good actually gets the reward he or she deserves. There are no major differences (Agent, Case Beta, November 2014).

I don't think that the salary affects one's willingness to perform, I don't think it triggers at all actually. Our salary increments are so low, unfortunately. We might not have anything more to give. But maybe they performed much better this year but received a lower wage growth since the pot of money was smaller this year [compared to the previous year]. I sometimes discuss giving 50 SEK more or less and it's not fun. Between high and low performers it differs maybe 20 SEK in [monthly] salary here and there, of course it's frustrating (Middle manager, Case Gamma, November 2013).

It's like old school reports. You must have x amount of students performing 75 [percent] in order to give someone else 125 [percent]. We need to drop this. It's not believable anymore. We have much less motivating efficiency-targets this year, which has an obvious connection to

the development of the wages. If I perform at max max max, maybe I get 2,95 percent in bonus and if I deliver on an average level, I might get 2,55 percent [in bonus], and that bonus is a difference of 75 SEK. It's quite natural; one cannot deceive the agent indefinitely (Manager in top management, November 2013).

(3) The time period between performance achievement and rewards for that achievement were perceived as too far apart to link them together.

I don't think our incentive system is good if we are to look at how we motivate people to perform. You get a paid 15 months after you have performed, well thanks, but it is too far from it, you can't see any direct link to what you actually do, it takes too long time and it doesn't matter for performance. Targets need to motivate them during the entire year (Middle manager, Case Beta, November 2014).

One middle manager (Case Delta) utilized a self-initiated system of direct rewards based on rewarding an agent for good performance levels over time (so not entirely directly) with a reward of value for that particular individual in front of colleagues. Direct rewards motivated the rewarded agent to continue performing well for a short while after being rewarded and also aimed to spur colleagues to perform better. However, success was variable.

It's quite visible that others didn't receive anything, that they are not considered to deliver as expected. For example, there was one guy that had performed really well during half a year and I know he loves ice hockey, so I told him out in the group, so everyone could hear it, "I know you have been performing so well for so long now without having any dips, you really deliver. And I know you like ice hockey, so the next time you know what game you want to go to, tell me and I'll buy two tickets!" That will trigger the others too (Middle manager, Case Delta, November 2013).

(4) Further reasons for why the goal-setting and incentive structure was perceived as dysfunctional were based on inconsistent targets during a working year. The empirical observations showed that agents demanded certain stability in the organization (at least for a year) to perceive the reward system as credible. Considering the system less credible by each change is an inflexible strategy for adapting to external and/or changing circumstances.

They receive a long-term target for a year but it's challenging for them to think performance during an entire year. And targets can of course change constantly during the year anyway, so you lose confidence for the targets

too. Changing too much is not credible to them (Middle manager, November 2014).

Everyone knows what happened two years ago [in 2011]. Each agent who had an incentive target of 130–140 percent [of the expected performance level] was fooled. Suddenly one [the top management] decides very quietly that: Now we change the evaluation scale from 200 to 100 percent, end of story! Well, but how... believable is it to run faster [perform better] after this? Have you been deceived once, well, then you only ensure that you will lie in the middle and it will only be at 100. The incentive system is a one-sided undertaking by the employer, that's something one should be very clear of (Manager in top management, November 2013).

Aiming to perform at 130 percent of the expected level of performance (total performance of the year) was also reflected in marginally higher material compensation at the end of that year. However, since a large number of agents actually reached that level (in 2011), this would also imply a larger amount of (total) compensation than initially expected. As a result, top management lowered the maximum performance rate. This change resulted in agents being given lower reward levels than expected for performing well above expectations, which led to distrust of the incentive system and a lower willingness to further perform above expectations. A final reason why the goal-setting and incentive structure was not functional was the fact that (5) money did not seem to trigger all agents to perform well.

There need to exist triggers. It's generally difficult to find this motivational element because money doesn't trigger all individuals. We have not succeeded when it comes to the targets (Middle manager, Case Epsilon, November 2014).

Some are really triggered by money and stuff like that but many [agents] don't really care. You might start thinking about the incentive targets before the performance appraisal, then one can think that maybe I should have done a little bit better in some parts but that's nothing that really drives me (Agent, Case Delta, November 2014).

A final indication that targets did not motivate all agents was based on the insight that some agents did not even seem to know which targets to reach, which undermined the entire target and incentive system.

At least half of the [agents in the] group don't even know what incentive targets they have (Middle manager, Case Gamma, November 2013).

These empirical manifestations show that how the company runs its business and call center workplace affect performance. A goal-setting and incentive structure that functions provides a tool for management to spur various types and levels of performance, often for improving individual and group efficiency and sales (see the coping strategy of avoidance; Chapter 7.1.2). However, the benefits of controlling the business through this performance system are drastically reduced if it does not spur workers to perform. This was especially evident among agents who adopted the coping strategy of resignation. These agents were not spurred by reaching targets (Chapter 7.1.3). This was also evident in relation to prevailing collective values, in which values based on selecting which sales product to offer customers were preferred over reaching overall sales targets (Chapter 7.2.3).

This study showed variability in functionality of the performance-management system. It was dysfunctional for some agents (resulting in lower levels of individual on-phone efficiency and sales) but functional for others (resulting in higher levels of individual on-phone efficiency and sales). In addition, the goal and incentive system was utilized by middle managers as a disincentive, specifically by motivating underperforming agents to change jobs by not giving them any wage increase. Using a dysfunctional performance-management system as a method for exit was not successful, precisely because some agents were not motivated by money in the first place. Also, some agents chose to use the coping strategy of pausing (Chapter 7.1.2), despite awareness of the negative impact on their (short-term) efficiency on-phone and their ability to receive a higher wage increase the following year. This further verifies the low (but variable) impact of incentives upon agents' willingness to perform above expectations. These indications represent further evidence that the performance-management system does not seem to function to the organization's advantage in terms of creating favorable conditions for all agents to achieve overall high performance. Regardless of perceiving the goal-setting and incentive system as functional or dysfunctional, the performance-management system was based on reaching satisfactory, rather than maximum, performance levels (pushing people to perform at the peak of their abilities). This system also influenced organizational behaviors at the group level.

## *2. Performance conflicts between internal performance metrics*

There were certain inherent conflicts between performance metrics that Eon CS used to control and spur performance. Since the goal-setting and incentive system adapted to Eon CS' change of strategy, which entailed a greater focus on on-phone efficiency and sales, there was an inherent conflict between these and other utilized targets (such as customer satisfaction, administrative efficiency, and e-mail efficiency). Agents who knew how to fully carry out their work perceived these goal conflicts, but could nevertheless handle them smoothly and reach all their targets. However, agents lacking certain knowledge of their work instead handled these perceived problems through coping by prioritizing certain metrics and targets ahead of others (Chapter 7.1.2; coping strategy 6). How agents prioritized between metrics influenced individual performance. It seems that Eon CS employed a dysfunctional goal-setting structure, since it demanded that agents adopt a coping strategy of prioritizing between targets, which resulted in lower performance within certain metrics. However, the system could instead be regarded as functional for agents who possessed knowledge of how to carry out their work according to demands. Moreover, agents tried, to varying degrees, to make their middle manager as satisfied as possible by focusing on reaching good performance in line with the manager's expectations and levels of priority, regardless of whether or not they were spurred by the goal-setting and incentive structure.

There were four particular performance conflicts, between: (a) efficiency and customer satisfaction; (b) customer satisfaction and sales; (c) sales, efficiency, and customer satisfaction; and (d) efficiency and administrative/e-mail efficiency. Each performance conflict will be discussed below.

### *(a) Performance conflict between efficiency and customer satisfaction*

Agents perceived a conflict between reaching high levels of on-phone efficiency and making customers entirely satisfied, since the latter objective required additional time to accomplish. Spending additional time with a customer on the phone would negatively influence reaching high efficiency levels that would result in lower pay rise over time.

Is there something else I can help you with? The last question before hanging up. You might get a higher Customer Satisfaction Index at the expense of longer errand-time. I mean, customers are not only talking

about the contracts, they talk about their lives and other things too (Agent, Case Epsilon, December 2012).

One can be happy that I made the customer satisfied but my manager won't like if my statistics look like this, even if they say that you should take your time. But when you have a meeting with the manager, then they have forgotten that, they only look at the poor statistics, even if I do exactly what I should do. The targets are there to reach efficiency and I will receive less pay rise and even higher targets to reach. Targets mean control (Agent, Case Delta, November 2014).

Managers regarded primarily caring for the customer but receiving lower levels of efficiency on-phone (in the short-term perspective) as unacceptable working behavior, which was punished by reduced pay.

On a short-term basis, one wants to reach the goals of course, that is what gives one something in bonus or in it's pay envelope, but on a long-term [basis] it's important to have satisfied customers, otherwise we have no customers left at all in the end (Agent, Case Epsilon, December 2012).

There was also a distinction between making a customer satisfied or entirely satisfied, which was a choice agents made on the basis of their chances of reaching both high customer satisfaction and high efficiency during a call.

In my goal it's included to make the customer satisfied. But to be honest, that Bengt gets entirely happy or if Bengt gets [only] happy will not be manifested in my pay envelope, but it's manifested if I reach my goals. I'll try to make him really happy but the most important is to attain the targets (Agent, Case Epsilon, December 2012).

The inherent performance conflict between on-phone efficiency and customer satisfaction was based on the challenges of dividing the time during a call into favoring certain metrics, which mostly followed the managerial focus of reaching high efficiency on-phone.<sup>71</sup> However, others primarily focused on the customer (coping by prioritizing). The ability to

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<sup>71</sup> An additional manifestation of the fact that middle managers prioritized certain targets became evident when I asked about the current performance status in their respective groups. Almost all middle managers first presented the performance statistics regarding efficiency and sales, which were in detail and summarized as a monthly performance output. When I asked about the current performance of the other metrics (the middle managers did not always present the other figures themselves), they often replied similar to "I don't really know the CSI by heart." These statements rather clearly reflect managerial priorities of metrics.

make customers entirely satisfied (applying a long-term perspective) was also weighted against the level of material rewards given by being efficient on-phone (applying a short-term perspective). The incentive system created a conflict for agents who could not reach targets within both performance metrics, which often meant that less effort was spent on making customers entirely satisfied.

*(b) Performance conflict between sales and customer satisfaction*

There was also a performance conflict between sales (selling additional agreements) and customer satisfaction. Achieving good performance within both types of performance metrics was difficult, since they required different focuses.

There are those [agents] who sell, sell, sell, but how well that is done, I don't know. They usually don't care that much about the customer either (Agent, Case Gamma, November 2014).

[The performance metrics of] Customer Satisfaction Index and sales are not compatible. If you are really nice, caring and helpful and the customer says "Oh God what a great call", I will get a 6 [the highest rate of Customer Satisfaction Index] from her, but I haven't sold anything. Those two metrics are very far apart. Or the opposite: I talk to customers and sell really good, and I might think it was a good call, but the customer might not have felt the same way. Maybe I sold wind power and 100 check<sup>72</sup> but maybe the customer thought "God, she just loaded me with sales stuff", and you might get a 3 [in Customer Satisfaction Index] (Agent, Case Delta, November 2014).

Another reason for why the performance metrics for sales and customer satisfaction were not fully compatible was the fact that the primary tool for motivating sales (initiating competitions) generally did not benefit the customers' satisfaction. More specifically, some agents expressed that *ugly sales* (contracts sold on false or misleading premises) were motivated by these competitions.

Much can go wrong when competing on things. Some might cheat, not being really honest with the customer. But if the customer discovers it [the misleading information], it won't be any good at all. Sales is supposed to be an honest thing, ugly sales are just aimed for receiving a pin [on the board] (Agent, Case Gamma, November 2014).

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<sup>72</sup> 100 check is an energy-device function that provides direct information to consumers about their energy consumption.

The difficulty in fully satisfying customers while reaching high sales rates was challenging for some agents because the targets conflicted.

*(c) Performance conflict between sales, efficiency, and customer satisfaction*

Evidence also suggests a contradictory relationship between the three performance metrics (sales, efficiency, and customer satisfaction).

It takes longer time during a call to sell contracts, but you should still reach a certain number of calls during an hour, that's a difficult balancing act. You need to be fast while selling and don't spend too much time on the customers. But it might be worth taking an extra minute for talking to the customer to receive a higher Customer Satisfaction Index. Those [agents] who have worked here for a long time are probably like that, that they take this extra moment. The younger ones are more like pushing, because that's what they have learned, we old ones never learned that, but we learned how to be nice to the customers and how to help them if they had any problems, and to complete an errand (Agent, Case Beta, November 2014).

An underlying requirement for handling the conflict between sales and making a customer satisfied was based on the understanding that additional time must be spent on interacting with the customer. For example, agents were required to answer a larger number of questions, provide more information in relation to the sales product or agreement during the call, pay attention, listen and let the customer talk to make them entirely satisfied with the interaction. These activities required spending additional time with the customer to perform well. On the other hand, time impaired the ability to be efficient on-phone. Optimally, the agent manages a sales offer while interacting efficiently with the customer, which reflects knowledge of how to carry out call center work. In addition, particularly experienced agents tended to favor making customers satisfied over reaching high levels of on-phone efficiency (Chapter 7.2.1).

*(d) Performance conflict between efficiency and administrative/e-mail efficiency*

The last performance conflict between the internal performance metrics concerns the perceived challenge of being efficient on-phone while spending time solving more complex problems, often measured through the performance metrics of administrative and e-mail efficiency. First, agents and managers perceived errands and more complex customer



problems to differ in character. *Errands* were broad issues that were easily, rapidly solved (such as handling electric agreements, change of address, invoices, checking current prices of the electric agreements). Customer problems, on the other hand, were trickier and often must be handled more thoroughly (such as handling issues in relation to renewable energy, technical support). Customer problems were often received by e-mail or during scheduled time for solving administrative errands (also sometimes during green time). These types of customer problems were also seen as more time-consuming than solving errands.

A problem takes longer time. My agents don't possess the character of being problem-solvers, it's a characteristic feature. Instead they think, "keep it simple," it has to be quick, effortless, simple, and problems become bothersome. I think that when problems show up, they're leaving them unsolved. That combination is very rare to find, to be able to do both, that they are fast while they also are cavemen, that they like to dig into problems I mean (Middle manager, Case Delta, November 2013).

Not only does the time spent appear to differentiate errands and customer problems, agents' personalities and interests reinforced this performance conflict. This specific performance conflict was especially evident in Case Epsilon, in which agents (during a group meeting) explained that solving customer problems impeded their ability to reach individual targets for on-phone efficiency.

Agent (1): There are 1,000 stuff in the world that I think are more fun [than solving customer problems]. I have nothing against solving their problems, absolutely not. To solve problems, it feels like I'm sitting and digging into something that three or four agents before me did wrongly and I get to sit for 40, 50 minutes with it, and *that* is frustrating. It requires a lot more time.

Agent (2): It's fun to help the customer, but you might not feel happy afterwards, because you know that it has taken a lot of time to do it. And I think it's tough when you get a real fucking problem and just, oh well? Now that ruined the entire day. Perhaps one finally, for once, has managed to get a fairly good errand-time and this problem ruins it all. Then it doesn't matter if the customer says "Ohh, thank you! I don't give a damn because I still feel bad (Case Epsilon, December 2012).

The incompatibility between being efficient on-phone and efficiently solving complex errands during scheduled time for administration and e-mail derived from perceptions that the time required for thorough

examination impeded levels of on-phone efficiency. The same logic regarding time also applied among some agents in terms of learning how to solve customer problems. Engaging in ongoing learning activities was a basic premise for learning how to solve problems, but was also a time-consuming activity that conflicted with being efficient.

The sad thing is that we never really have time to immerse ourselves in something in the KB [knowledge base] or in some tasks, to really dig into a problem. It's a pity that time doesn't exist. Sometimes you have time to read what you need, sometimes not. That [the lack of time] inhibits the learning, it may take too long time to learn new things that thereby impair the statistics. You want to keep your errand-time (Agent, Case Epsilon, March 2012).

Again on-phone efficiency, attached to explicit targets and the incentive system, generally was higher on the priority list compared to the targets for administrative and e-mail efficiency. Perceiving a performance conflict and a time limitation reduced some agents' willingness to immerse in learning activities (regarding both broad and specialized skills) required for developing knowledge and skills valuable for solving customers' problems. The incentive system directly influenced agents' perceptions of whether or not there was enough time to spend on learning and solving customers' problems at the expense of their efficiency levels on-phone.

### *3. Performance conflict between internal targets and company vision: Short-term versus long-term perspective*

Over time, Eon CS evolved into primarily aiming for short-term measurable goals (internal targets) rather than its long-term objective and vision to *deliver the most liked customer experience* (Chapter 5.2.2). In line with an intensified emphasis on reaching more internal goals (an opposite trend of other customer support businesses, according to the division manager), there was less emphasis on the actual customer. Eon CS is now fully governed by the performance metrics and the targets that must be reached, rather than using targets as tools to fulfill the vision of the company. This has strengthened, year by year.

The purpose with Eon CS is not to deliver 5.2 errands per hour, or 8:30 in errand-time! Obviously, targets are a basic foundation for us in order to exist, otherwise we have no idea where we're standing, but our purpose, our goal with existing at all, that's not it! If they don't function towards the end customer, we won't exist anymore. We are a context, we can't be

this shortsighted, it's not all about today. We don't have a performance-management strategy. And each year we are taking a step further towards emphasizing targets instead of the other way. It's suddenly only seconds and minutes that matter here (Manager in top management, November 2013).

The development of internal goals and the accompanying incentive system contributed to fundamental challenges for agents to behave as customer service agents, given evidence that agents were required to put the needs of the customers aside if there were conflicting goals (see coping strategy of prioritizing; Chapter 7.1.2). Moreover, the dichotomy between these objectives (internal targets versus the vision) was driven by an overall lack of clarity and cohesion between managerial levels as to how to operationalize the company's vision, including the understanding of how internal targets should be used in the business.

We need consensus in why we need to measure things, how we should measure them and what targets to use. We measure so much today, it's a jungle, it's a forest of metrics and we are getting lost in it! And we need to open up for more fuzziness and blur regarding the targets (Division manager, November 2012).

There was a friction between management levels of whom to blame for this development, which the managers recognized as a performance conflict. For example, top management thought that since authority was given to each middle manager to govern their work groups according to their own idea of how the business should be operated, internal targets evolved into a real value for these managers and the agents. Middle managers' lack of interest and action was also a driver for this development.

The middle managers don't even question why we work as we do. They receive goals and targets that the division manager gives them, and they translate them into nothing more than digits. They are making it easy for themselves, and it's all about hard facts. I've heard her [the division manager], she drums really hard on this, and the middle managers are really result-oriented and manage agents only by those targets (Manager in top management, November 2013).

However, middle managers thought that the enlarged focus on short-term measurable targets came from the very nature of the call center work. Middle managers' daily situation requires action based on short-term strategies.

We [middle managers] currently focus on all those sub-targets so to say, and not on the large picture. We are chasing them all the time: How many Securitas have we been selling? What's your errand-time? It's those targets we chase all the time, it's not the vision. That we never talk about. Everything [all focus] is on the short term. Because each day is different and you are putting out fires everywhere, every day (Middle manager, November 2013).

However, both managerial levels (the division manager and middle managers) emphasized measurable targets for demonstrating results. The conflict between short-term targets and the long-term vision was reinforced both by the goal-setting and incentive structure, in line with managerial interest in demonstrating results. This impeded the possibility to satisfy customers at both the individual and group levels.

#### *Summary of control-based elements*

Elements based on control, specifically regarding issues related to the performance-management system (the goal-setting and incentive structure), were significant for understanding their impact on performance in this type of organization. The empirical observations particularly demonstrated three sub-elements, based on company- and workplace-based issues that affected individual- and sometimes group-based performance. More specifically, whether or not agents were motivated by targets and the prevailing incentive structure (considered as functional or dysfunctional) influenced levels of on-phone efficiency and sales rates at the individual level. This was also the case at the group level, depending on how the work group was structured (the number of newly hired agents versus the number of agents with long experience). The interpersonal element of control also influenced performance, since agents perceived inherent conflicts between internal performance metrics, which were handled differently depending upon agents' levels and type of knowledge (how they carried out the coping strategy of prioritizing). These performance conflicts generally generated higher individual on-phone efficiency and sales rates, but also lower performance within administrative and e-mail efficiency (given the absence of clear targets in the incentive system) and customer satisfaction (besides engaging in learning). However, performance conflicts could also affect performance at an aggregated level, given the trend among agents to prioritize similarly. Over time, the enlarged focus on reaching internal targets, rather than on the company's vision, produced an impeded scope for Eon

CS to act as a customer service business. This influenced performance at the group and individual levels.

The performance-management system did not only influence performance but also agents' informal behaviors or coping strategies when lacking knowledge of how to carry out the work according to requirements. For example, the interpersonal element of control (supported by managerial priorities and the change of organizational focus) influenced agents to adopt the coping strategy of prioritizing between performance metrics in a distinct manner, but also to what degree agents were coping by pausing. This performance-management system also spurred certain agents to not perform better than expected, given perceptions of low dividends when performing exceptionally well. These agents adopted the coping strategy of resignation (Chapter 7.1).

The incentive system and its underlying logic also influenced the contextual elements, specifically the benefits of having a set of diversified skills, knowledge, and experience within each work group. A helpful behavior among agents was not rewarded (Chapter 7.2.1), since it was not measured but instead negatively influence short-term efficiency levels on-phone. Therefore, management at Eon CS favored individualistic behaviors more than helping colleagues in the group to carry out their work through collective actions. Consequently, the performance-management system also impeded agents' possibilities to fully learn their work when coping by knowledge sharing (Chapter 7.1.1).

As a final note: Middle management's role regarding this interpersonal element indirectly affected individual and group performance. Middle managers' belief in the strength of measurable targets and their communication tactics were based on a desire to show results to top management. The targets that management emphasized and their choices in rewarding or not rewarding agents with salary increase and/or bonus not only influenced individual behaviors (spurring temporary agents short-term to peak their performance to receive tenure), but also the overall organizational behavior (emphasizing targets instead of the company vision).

### 7.2.3 Cultural elements: Value-based behaviors

Interviews and observations revealed that certain cultural elements were important for understanding performance drivers in this organizational setting. More specifically, this study refers to collective *value-based behaviors* as behaviors based on shared values and beliefs between individuals in a work group and a workplace. Interviews with agents and managers revealed two particularly important cultural elements for understanding performance in this setting. The elements of the fun factor and the collective values of products are based on shared values and beliefs that influenced performance in several ways. The workplace and the work group primarily matter for performance regarding the interpersonal element of culture.

#### *1. The fun factor: Joking and having fun*

This element refers to behaviors based on shared values and interpretations between individuals in a work group regarding joking and having fun. These behaviors were created and adopted by individuals in each work group, in accordance with their personalities and opinions. Therefore, both the level of fun and how it was carried out varied between work groups. For example, joking was carried out between individual colleagues, but also in the entire work group. In addition, agents joked and had fun with customers or sometimes about them with colleagues. These manifestations will be presented in relation to the impacts on performance in this organizational setting.

Joking and having fun influenced performance in several ways. First, since it contributed to a positive atmosphere in the group, it influenced the agents' attitudes when interacting with customers. It spurred higher levels of customer satisfaction. Higher levels of customer satisfaction applied at both the individual and group levels, since attitudes were spread within the work group.

Having fun together is definitely related to high customer satisfaction. If you have a good relationship with colleagues and have fun, you become happy yourself, and you perform well if you are in a good mood, you get triggered and get that extra edge. It affects the motivation. We have high customer satisfaction performance in the group (Agent, Case Gamma, November 2011).

In the past, the entire group had ball wars, or ball games. It's not supposed to be too many of those kinds of people in one group, it easily becomes a

kindergarten group. We have fun at work and that's important since it rubs off on the customers. There's an underlying reason why we have such good statistics. Our manager is gladly joining too and frolics herself and that characterizes the group as well (Agent, Case Delta, November 2011).

The level of fun carried out between colleagues varied between work groups, in which one group in particular (Case Delta) distinguished itself as a *kindergarten group*. This expression described a group of people having the most fun and child-like behaviors in the call center facility. In addition, joking with customers had positive impacts on customer satisfaction.

Having fun together contributes to higher Customer Satisfaction Index. You can be personal, one can laugh and have fun with the customers too, in the right way then. It requires skills of reading the customer that you get by experience. If you hear that they want to make fun of you, well, you do it back. What's the errand about and how does the customer sound like? Loud, etc., you have to notice that first (Agent, Case Delta, November 2011).

Second, having fun with colleagues positively influenced agents' sales rates.

Basically everything goes worse if you don't enjoy being together in the group. I am sure that if you have fun you also sell better. In our group, we are quite good at sales and we have a very good group, an open climate is important (Agent, Case Beta, November 2011).

Third, the fun factor also influenced on-phone efficiency, in both positive and negative ways. Specifically, agents and middle managers verified the negative impacts on on-phone efficiency of not having fun in the group. The willingness to stay efficient at routine work depended on keeping a positive mood in the group.

It's important to have fun, I think you perform better then. That you enjoy your colleagues is extremely important, it affects my willingness to be efficient. Previously I was in a group with a lot of whining, that affects you negatively. Even though I am very positive otherwise... my motivation was suddenly lost. You will not be as triggered, the whining takes over (Agent, Case Epsilon, November 2011).

We suddenly had a lot less fun together than before... And suddenly the performance was impaired, it was much worse than usual, and we talk a

lot worse! We went from [an average errand-time of] 8:15 to 9:30. A huge difference! (Middle manager, Case Beta, November 2013).

However, it was equally evident that having fun in the work group also generated lower levels of on-phone efficiency as a result of spending time interacting with colleagues, rather than solving an additional call during that time (see coping strategy of pausing; Chapter 7.1.2). Both the joking agent's and their colleagues' on-phone efficiency were impeded, which both agents and middle managers observed.

We have a good atmosphere, we often joke about it: "stop laughing, you're not supposed to have fun at work!" But what affects my performance is that I keep my mouth shut! I enjoy talking to the people sitting next to me, sometimes I talk too long, it's my own fault if the errand-time is longer than it should (Agent, Case Epsilon, March 2012).

During the summer, the performance dipped significantly. The errand-times were really crappy. They do have fun at work, but the important thing is that they actually deliver. We need to stop having too much fun though. It's important to find a balance (Middle manager, Case Delta, September 2012).

Having fun among colleagues but also with customers positively influenced customer satisfaction, sales, and on-phone efficiency in this organizational setting. However, it was equally evident that finding a suitable balance of having fun and joking in a work group was important to avoid significant negative impacts on agents' efficiency levels (on-phone).

Moreover, my observations revealed that agents also joked about customers. Agents sometimes made fun of customers both during and after the calls. For example, an agent was talking to a customer who, rather than deciding on which electricity agreement to choose, started talking about his recent career. While the customer was talking, the agent switched on the speakerphone to allow her table neighbors to listen in on the call. While the customer continued talking (for approximately 20 minutes), the agent drew a picture of a horse that she showed to her colleagues. When the conversation ended, the agent somewhat disrespectfully, but humorously, discussed the actual call and the customer with her colleagues during the following minute (considered a pause). After the discussion, the agent explained to me that the horse represent a person with a big mouth who talked a lot. In other words, the



horse represented the customer.<sup>73</sup> Although this behavior did not appear to influence performance directly, it still illustrates how agents handled unexpected long talk time by joking in informal ways.

Additional manifestations of why joking and having fun with colleagues generally motivated agents to perform better was based on enabling agents to remain at high levels of motivation when performing below expected levels, and on functioning as a cure for occasional boredom at work. Both situations could result in impaired performance levels if not handled with humor.

You need to have fun together, have open attitudes, laugh a lot and not just do this daily job. I mean, if the work doesn't flow well you can joke about it and turning something negative into something positive. It's an open atmosphere, you don't take it so seriously (Agent, Case Delta, November 2011).

It's important that you can have fun in the group, otherwise it will be very boring to sit here and work, then you just want to go home. It's the colleagues that make it fun. If it weren't for them and the atmosphere in the group, one wouldn't feel as much joy. In order to do a good job, you need to have fun too (Agent, Case Gamma, November 2011).

Furthermore, middle managers' role in relation to this cultural element was complex. For example, middle managers generally considered joking and having fun to be a success factor for spurring performance. Therefore, they allowed, encouraged, and even motivated agents to create a fun environment, but to varying degrees. Given the positive performance implications, most middle managers even encouraged these values in the recruitment process. They would hire people with the right attitude and personality. The importance of the composition of agents, such that all agents in the work group had similar opinions and comfort levels about using humor at work, were important prerequisites to benefit from this cultural element. However, the level of fun and joking must be kept at a balanced level and sometimes curbed to avoid negative impacts upon performance. For example, experiencing work as a playhouse was primarily impeded agents' on-phone efficiency.

If they [the agents] didn't have as much fun on the job as they do, they wouldn't either have been performing as well [as they do now]. It's good that it's [the rate of fun at work] as high as it is, as long as it doesn't steal

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<sup>73</sup> Observation and listening in on a call in Case Epsilon, March 2012.

time from work, but maybe it does to some extent. You can see it in some [agents'] wrap-up times (Middle manager, Case Beta, December 2012).

You still have to keep it professional, we often talk about that in my group, I need to tell them sometimes. The customer shouldn't hear screams and stuff. It creates a positive attitude as well, like a culture, good performance is all about having a positive attitude. You view the glass as half full instead of half empty (Middle manager, November 2014).

Middle managers primarily curbed the level of fun in the work groups by their physical presence. This was particularly evident when performance levels (on-phone efficiency) were significantly impaired during a middle manager's absence (during the summer, particularly in 2012 and 2013). However, agents wanted an even greater level of fun to be motivated to reach individual targets.

The [middle] manager has an important task to motivate and not to view everything only as requirements. They need to make requirements fun, make us think they are fun. That is lacking sometimes, but it depends on the manager you have as well, but it's their task. It's not easy, everyone's different and requires different treatment (Agent, Case Beta, November 2014).

Interviews and observations highlighted how the cultural element of joking and having fun spurred performance and addressed the indirect impact between middle managers' actions and performance in this organizational setting.

## *2. Collective values of products*

Interviews and observations clarified that certain collective values prevailed, which influenced overall sales performance. Call center agents shared certain values regarding some of the company products, which each agent was supposed to offer to customers during incoming calls. Acting upon these values influenced which products were/were not offered to customers. This influenced agents' sales performance. Collective values of products influenced sales performance in two ways.

First, shared values of the company's renewable energy products prevailed among agents in the call center in Sollefteå. Some agents perceived that hydropower and/or wind power had negative effects on environmental surroundings. This value motivated them to avoid selling agreements that included these renewable energy sources (agreements that are referred to and measured as products). Although each agent was

required to offer these products to customers, acting on these collective values about renewable energy influenced their own and the organization's sales performance. Differences between the call center facilities regarding these values came from the fact that power stations (such as wind farms) were more visible in northern Sweden, along with their effects on the environment.

I don't think hydropower is a good thing at all. It destroys everything, it destroys fishing and a lot more. I don't feel good about trying to sell something like that (Agent, Case Gamma, November 2014).

These values are more apparent up here in the north because we can see the wind farms and the buildings, their impact upon animals, etc. We are a bit more well-informed about those problems up here than what they [the agents and middle managers] are in Norrköping (Middle manager, Case Delta, November 2014).

As for wind power, I think that we have an advantage that the wind farms are not that visible here [compared to in Sollefteå] (Middle manager in Norrköping, November 2014).

Based upon these observations, it was clear that collective values of renewable energy products negatively influenced sales performance in one of the call centers, which included performance at individual and group levels.

Second, interviews and observations also revealed that collective values about additional sales products prevailed among agents. Agents in both call center facilities avoided offering company products such as insurance and alarms (Chapter 5.2.2) during incoming calls because they did not consider these products to be in line with Eon's core business (handling energy issues) or their regular work tasks.

Especially 100 check<sup>74</sup> and wind power flows rather well because it's for the environment and stuff, it's related to energy issues. But Securitas and IF don't feel ok, because they haven't got anything to do with this [work], it feels so unnatural to include that in a conversation, it's difficult to include it at all (Agent, Case Epsilon, November 2014).

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<sup>74</sup> As noted in Chapter 7.2.2 (b), 100 check is an energy-device function that provides direct information to consumers about their energy consumption.

For example, 100 check and wind power is a lot closer to the core business than what IF and Securitas are, and of course that matters when interacting with customers (Agent, Case Delta, November 2014).

Wind power is easier because it's more natural, they see a direct link to what we do here with electricity, but many other products are challenging since they can't see the link to energy (Middle manager, November 2014).

Acting on collective values regarding which products are in line with Eon's core business influenced which sales products agents did or didn't offer or sell. Given the collective nature of these values, they not only negatively influenced individual sales performance but also performance at the group and organizational levels.

Middle managers' role in relation to this cultural element was clearly significant. Given middle management's awareness that these collective values generally governed agents' sales behaviors and were negatively associated with sales performance, middle managers' role was primarily to suppress these values' impact on business operations. Middle managers actively tried to make agents disregard these values in their work and act as ambassadors for all sales products (regardless of their own values regarding these products).

Very, very often it [sales] concerns values, it's at such a fundamental level. Values mean something in this organization based upon the way that we sell (Middle manager, Case Beta, November 2014).

I don't think that 100 check is so damn good, but you still have to ensure that the agents sell it. But it's clear that they put values into it too, it steals a lot of energy. We have a lot of discussions around this, that you have to sell something that you deep down don't believe in but that they still need to see an advantage with using. We work a lot with the need to add values aside. It's a problem (Middle manager, November 2014).

For example, some middle managers tried to initiate a sales competition for all agents in the Norrköping call center to make agents disregard and change prevailing collective values of company products. Activities during this competition aimed to make agents perceive sales targets and company products as (another) fun component of work and thereby change agents' perceptions of these products.

When it comes to sales, then we have to work with putting aside the values and making them understand why it's important to sell wind power or 100 check. We were supposed to reach a milestone for wind power and the

idea was to make it fun, create a community but by avoiding costs. It's quite common in the US to have Office Olympics. We made simple stations with stuff from the office and the groups competed against each other, and they needed to qualify. They competed in the dining area, they were supposed to sit on a balance ball as long as possible, shooting rubber bands, office chair race... there were a lot of fun stuff going on! And after that, everyone uploaded pictures on facebook. It was a success! (Middle manager, Case Epsilon, November 2014).

Influencing agents' values and perceptions of products by initiating fun competitions aimed to enhance individual, group, and organizational sales performance. Instead of adapting additional products to the core of the business (based on agents' perceptions) at a top-management level, middle managers were required to handle how agents acted upon their collective values. In addition, these conscious individual choices regarding sales products influenced sales performance and customers' possibilities to choose the products in which they were/were not interested, given that not all products were offered. Agents' collective values influenced them to avoid carrying out certain components of their work tasks. Therefore, these values represented a certain form of informal behavior within the formal behavior of work. Although agents offered sales products to customers (formal behavior), they still did not offer all sales products in the interactions (informal behavior). They prioritized and, more specifically, downplayed certain products over others (coping strategy of prioritizing; Chapter 7.1.2).

### *Summary of cultural elements*

Cultural elements influenced performance in this organizational setting through the elements of joking and having fun, and collective values. For example, individual- and group-based sales performance was enhanced by joking and having fun with colleagues in the work group. However, sales performance declined when acting upon certain collective values in the workplace. Therefore, ensuring that collective values, and joking and having fun, contribute to behaviors in line with business operations (offering renewable energy and additional sales products) is significant for achieving high sales performance in this organizational setting. Joking and having fun with colleagues and customers also contributed to higher customer satisfaction and higher on-phone efficiency, since it generated a positive atmosphere. This spurred agents' levels of motivation to favor both performance metrics. However, the fun factor also contributed to lower levels of on-phone efficiency among individuals who tended to

interact too much. Joking about customers did not have any impact on performance at Eon CS.

These cultural elements influenced agents' coping strategies (such as pausing or prioritizing certain sales products over others). The fact that agents followed their collective values, rather than the logic of the performance-management system, implies that the sales targets did not motivate agents enough to follow managerial rules and instructions. These manifestations of workplace- and group-based behaviors were significant not only for gaining an enriched understanding of how cultural elements mattered in this organizational setting, but also for understanding how managers must handle (facilitate, encourage, balance, curb, and control) these behaviors and elements to motivate performance.

## **7.2.4 Summary of the interpersonal elements**

Studying Eon CS revealed three distinct interpersonal elements (with sub-elements) to influence various performance metrics at the individual and group levels. First, utilizing a group-based strategy of including a diversified set of knowledge, skills, and experience into each work group positively and negatively influenced both individual and group performance. This group-based knowledge strategy relied on the assumption that these call center agents generally did not have the appropriate skills to solve all types of errands and problems they faced. In fact, the general understanding was that agents rarely performed proficiently within all performance metrics upon which these call centers were measured. The nature of the call center work generated certain shortcomings (both knowledge- and performance-based) that must be compensated. Eon CS aimed to solve this within each work group. Consequently, moderately high performance levels within these performance metrics were achieved in the organization.

Second, certain control-based elements and, more specifically, the goal-setting and incentive structure were important to understand performance at Eon CS. This included indications of whether the exercised control was functional or dysfunctional. These elements were important to understand how targets and incentives were used in this organization but also to see how various organizational members acted on the prevailing control. The findings highlighted the fact that the use of targets and incentives influenced both individual and group performance (regarding on-phone efficiency, sales, and customer satisfaction), and how agents handled

(coped with) a perceived misalignment between performance metrics in different ways. Differences depended on agents' levels and type of knowledge, which primarily influenced individual performance. The empirical findings also implied that Eon CS's ability to reach its vision over time diminished in line with greater emphasis on reaching internal targets. Since the organizational change toward focusing on sales and measurable targets impaired the scope for fully helping customers, individual and group performance was impeded in terms of customer satisfaction.

Third, agents' cultural elements (in terms of value-based behaviors) influenced performance through the sub-elements of joking and having fun, and collective values. Whereas joking and having fun with customers and colleagues, both positively and negatively influenced individual and group performance (on-phone efficiency, sales, and customer satisfaction), the collective values of company products had a primarily negative impact on individual and group sales performance. The collective values of company products primarily prevailed within one call center facility, which influenced sales performance, depending upon which products were offered to customers. Acting on values regarding which products to offer was not in line with the company's core business and negatively influenced sales performance.

### 7.3 Chapter summary

The empirical data derived from interviews, meetings, and observations at Eon CS showed that both individual and interpersonal elements are crucial for understanding drivers of individual and group performance. Agents' and management's perceptions of which elements influence performance, including their perceptions of performance, generated the empirical findings of this study. In terms of understanding the adoption of coping strategies in the absence of appropriate level and type of knowledge for carrying out work according to requirements, as well as how the interpersonal elements manifested, these elements reflected certain individual and group behaviors that varied over time and between agents. The empirical presentation also showed that some of these behaviors at Eon CS were formal, whereas others were more informal. The behaviors reflected in each of the four elements varied, depending on if they were

more or less observable (since managers saw some behaviors more than others), and more passive or active.

Moreover, responses from agents and management also revealed that the three interpersonal elements (and their sub-elements) influenced agents' coping strategies, in terms of if (and how) they did or did not handle their lack of knowledge of how to execute their work according to requirements. For example, the contextual elements influenced agents to adopt fight-, flight-, and forgo-based coping strategies (such as internal knowledge sharing, inward escape, physical escape, pausing, and resignation). The control-based elements also influenced several coping strategies (such as knowledge sharing, pausing, prioritizing, and resignation). The cultural elements specifically influenced agents to adopt the flight-based coping strategies of prioritizing and pausing to escape from handling their lack of knowledge. The three interpersonal elements also influenced individual perceptions of how time and subjectivity should be acted upon, which differed between agents and managers in this organizational context. The empirical findings also highlighted a reciprocal influence of varying degrees between the interpersonal elements.

Furthermore, the empirical findings also revealed that management was significant for understanding performance at Eon CS. More specifically, middle managers' roles and actions had an indirect impact on individual and group performance by influencing agents' behaviors at work. Middle managers were required to motivate, spur, and curb behaviors in various ways (such as providing performance support, personal support, feedback, and control through physical presence) to drive agents to perform in line with individual and group requirements. Managerial feedback was an important tool for agents to keep motivated and reaching targets.

I'm absolutely convinced that we [middle managers] make a difference in performance overall, because the organization is so controlled. We are the only ones they can get the confirmation from. To get feedback, to get confirmation that someone noticed that you do did well, yes, then you can keep up, one is willing to. To be seen by their manager is very important. I mean, does anything matter if no one notices that you do something? That's how it is in this organization, it has to come from me (Middle manager, Case Beta, November 2014).

The feedback makes me perform better. To achieve some praise when you succeed with something makes you having the energy to keep on fighting. If I work hard with something and succeed but the manager doesn't even



seem to notice anything, at least I don't have any motivation to continue (Agent, Case Gamma, April 2012).

The empirical findings presented in this chapter show that middle managers mediate between top-management requirements and agents' performance efforts. The importance of this complex managerial role and its indirect impact upon individual and group performance was evident to varying degrees within each of the four elements. Given the nature of the call center work, the empirical manifestations highlighted that managerial actions were required at varying levels in each work group and must be exercised to varying degrees at different time (see examples in Chapter 6.3). Table 18 provides a full summary of the elements that influenced performance at Eon CS. The following chapter will thoroughly analyze these elements and their impact on performance in relation to the preliminary theoretical framework and the three performance categories.

Table 18: Summary of how the four elements influenced performance at the individual and group levels (H: Higher, L: Lower, M: Maintained performance)

Analytical elements/Impact on performance metrics		Telephone efficiency		Customer satisfaction		Sales		Administrative efficiency/ E-mail efficiency		Sick leave	
		Ind.	Group	Ind.	Group	Ind.	Group	Ind.	Group	Ind.	Group
Individual elements	Fight-based coping strategies	H	L					H	H		
		H		H							
	Flight-based coping strategies		L								H
		M				M					H
		L	L								
		L	L					L	L		L
Forgo-based coping strategies	H/L		H/L		H/L		L	L			
	L	L	M		L		M				
Inter-personal elements	Contextual elements	H/L	L		H		H	H	H	H	H
	Control-based elements	H/L	H/L				H/L	H/L			
		H		H/L		H		L			
						L		L			
Cultural elements	H/L	H/L	H	H	H	H	H	H	H		
					L		L				
	1) The fun factor: Joking and having fun										
	2) Collective values of products						L	L	L		



# Chapter 8 | Analyzing the 4 C's of organizational behavior

This chapter will analyze the empirical findings that influenced performance in the call center context in relation to prior theory. The empirical findings in this study are categorized as the four C's of organizational behavior in the call center setting (Coping, Contextual elements, Control-based elements, Cultural elements). These findings will be discussed in terms of the three performance categories (presented in Chapter 6.2). This analysis will be followed by an illustration of how the interpersonal elements and the individual element of coping and performance are linked. This will then be discussed in relation to the preliminary theoretical framework (presented in Chapter 3).

## 8.1 Analyzing the elements influencing performance in a call center setting

In the following sections, I will present my analysis in relation to prior literature and the implications from my research.

### **8.1.1 Analyzing the nine coping strategies influencing performance at Eon CS**

The empirical findings provided strong indications that coping is central for understanding the relationship between individual elements and performance in the call center context. In my analysis of the two call centers, I found nine salient coping strategies that reflected various types of behaviors. The main reason for using these coping strategies was based on uncertainties and unexpected variability in work tasks (since no manual covered how to solve each specific task in the call center). The nature of

the work demanded that the individual worker either know exactly how to solve a problem (through knowledge) or to cope with the problem to learn how to carry out the work. However, developing and carrying out these coping strategies were also motivated by dysfunctions of the performance-management systems of the two call centers, in which agents tried to compensate for the dysfunctions themselves in informal ways.

These empirical findings not only nuance previous cognitive empirical research regarding the characterization of call center work (e.g., Deery & Kinnie, 2004; Renn & Fedor, 2001; Wallace et al., 2000), a topic that rarely has been questioned. The study also supports, extends, and contradicts insights from prior studies on coping in this type of organizational setting (e.g., Baranik et al, 2014; Harry, 2014; Svensson, 2012; Tuten & Neidermeyer, 2004). The following analysis will elaborate on these matters.

#### *Coping strategy 1: Internal knowledge sharing*

The coping strategy of internal knowledge sharing reflects a time-efficient way for the knowledge-seeking agent and the work group to get the knowledge needed for solving work-related problems. From a worker perspective, teams in call centers are not only just for providing social and emotional support, which has been proposed by Mulholland (2002).

Following research by Geller & Bamberger (2009), Gnaur (2010), and van den Broek et al. (2008), internal knowledge sharing as a coping strategy was one of the most important sources for continuous learning in the call center setting. The underlying feature of this coping strategy is based upon agents' willingness to face their problems in the absence of knowledge. The results also showed that this learning practice not only occurred during idle time (Korczynski, 2003; Mulholland, 2002), but also while carrying out work tasks. This interplay, task support, and collaboration between colleagues in call centers for solving tasks contrasts research to the contrary (i.e. Mahesh & Kasturi, 2006; Sawyerr et al., 2009; Thompson et al., 2004; Townsend, 2004).

Given the help provided from colleagues, this coping strategy also much resembles informal networks to spur high initial levels of productivity (see Castilla, 2005). The findings showing that tenured agents with experience primarily provided the knowledge also aligns with research by Frenkel et al. (1998) and Rowe et al. (2011) showing that tenured agents help colleagues resolve problems. Therefore, the work structure in which all

agents perform similar tasks facilitated this coping strategy. This result is in line with Mintzberg's (1983) view regarding the benefits of operating with general knowledge within this type of work structure. Since knowledge was primarily given to a specific individual rather than the entire team, these findings nuance Stasser et al.'s (1995) view that colleagues collectively contribute with their unique expertise. My analysis revealed that the work group and the interaction within it constituted an important element for agents to cope, and was also a key source for learning in the call center. The findings extend our understanding of the collective impact on coping in call centers.

Unlike Korczynski's (2003) description of *communities of coping*, this study points at a learning-based dimension of coping. Korczynski's narrow approach to this form of joint coping excluded the fact that these communities were not only aimed at managing perceived challenges caused by customers, but also at handling agents' absence of knowledge of how to effectively work.

Although knowledge sharing in this type of setting implies cooperation, in which the knowledge provider is primarily a team player, knowledge sharing is still based upon loyalty to colleagues. However, unlike in Knights & McCabe (1998), the coping strategy of internal knowledge sharing is not a team-building activity in its basic sense. These results instead follow findings in Korczynski (2001) and Belt et al. (2002), advocating that loyalty through helpfulness contributes to a team spirit that benefit the group. Also, unlike Townsend (2004), but in line with Broek et al.'s (2008) view, this study found no evidence of peer surveillance, despite facing the same performance metrics and targets in the group. These results contradict the pessimistic view of call centers regarding peer surveillance. Instead, they extend prior research by Bordia et al. (2010) by contributing with insights regarding the importance of employee-team relationships, which are informal relations that were often previously overlooked.

The empirical findings highlighted that experience with call center work generated varying skill types and levels among agents. The fact that skills differ between agents in a call center setting is a fairly basic, yet important finding to understand why individual and group performance differs, as well as to understand the need for coping through knowledge sharing. Following Renn & Fedor's (2001) and Thompson et al.'s (2001) call for further research to acknowledge the heterogeneity of work in call centers, this study contributed by clarifying the distinction between general skills

and homogeneous skills in the call center context. This finding nuanced research addressing the fact that call center agents primarily possess general skills in many areas of work (Frenkel et al., 1999; Korczynski, 2005; Rose & Wright, 2005).

The coping strategy of internal knowledge sharing also nuances cognitive explanations of group effectiveness in organizational studies addressing the fact that knowledge sharing in groups entails performance gains (Batt & Moynihan, 2002; Brown & Duguid, 2000). Unlike research by Blackler (1995), in which this collective practice simply was regarded to secure good performance, my analysis showed that this coping strategy is a more complex practice than what has been acknowledged in prior theory. The complexity was related to how individuals got involved in the knowledge-sharing practice in various ways. For example, given that knowledge sharing was considered a time-consuming activity, the results showed that providing knowledge entailed lower routine-based efficiency. In contrast to research by Sergeant & Frenkel (2000), this finding highlighted the differences for performance between the provider and receiver of knowledge in relation to this coping strategy, which was not made entirely clear in prior theory. Based upon this analysis, this study also contrasts with findings in Knights & McCabe (1998) and van den Broek et al. (2004) stating that workers' performance always takes precedence over knowledge sharing. Instead, this study found that knowledge was shared despite awareness of performance declines, which might be associated with higher costs in the (very) short-term perspective for keeping routine-based efficiency at expected levels.

Unlike prior theory regarding internal knowledge sharing (Batt & Colvin, 2011; Moynihan & Batt, 2001; Mulholland, 2002), this study found no specific impact on service quality. This study instead follows the logic in Frenkel et al. (1998) that knowledge sharing in call center teams is a basic premise for service quality, rather than directly linked to service quality, since this coping strategy contributes to a higher rate of resolved errands and problems. Although these findings follow research that found these created collaborative structures in call centers to be important, they also deviate from the aim of these structures, which according to Batt & Moynihan (2002), is aimed at providing better service to customers. Also, in contrast to Batt (1999; 2002) and Deery et al. (2002), this study found no specific link between internal knowledge sharing and sales. This highlights the specific importance for routine-based and problem-solving efficiency for understanding this coping strategy.

### *Coping strategy 2: Resistance*

The empirical results showed that the coping strategy of resistance is important for understanding performance in the call center context. Compared to prior research, this coping strategy did not demonstrate any forms of subjective collectivism for resisting managerial power as addressed in Taylor & Bain (2003; 2005) or resisting acts against the managers (Fleming, 2005; Korczynski, 2011). Similarly, the empirical findings showed no manifestations of cynicism or satire toward management (Fleming & Spicer, 2003), nor active sabotage against customers as Wang et al. (2011) found. Given that the view of customers in this study contradicts Korczynski's (2003) view of the *sovereign customer*, these findings showed that customers were generally not perceived as rude or aggressive. Rather, customers' issues and problems that agents perceived as challenging. This study also downplays the pessimistic view in prior call center studies regarding the characterization of customers. Instead, this coping strategy specifically reflects resistance toward organizational and managerial practices (Knights & McCabe, 1998; Nyberg & Mueller, 2009) aimed at temporarily fighting against solving lack of knowledge of how to carry out work in line with requirements.

Resistance as a coping strategy represented explicit acts of breaking the rules of work, which is in line with the dominating view of resistance (to represent organizational misbehavior as noted in Barnes, 2005). The type of work effort underlying the coping strategy of resistance (such as manipulating the schedule) reflects efforts outside the system developed by management. This differs from prior theory (Spender, 1994). In prior theory, work effort most often aims toward constant improvements within the management system. Also, given that the coping strategy of resistance was carried out in these call centers, this study is both in line with prior studies advocating absence of total management control in call centers (Taylor & Bain, 2003; 2005) but also with research stating that call center managers are distanced from the actual work (Batt & Moynihan, 2002). Given that agents were punished in hindsight for taking shortcuts in their work, even though routine-based efficiency was enhanced, this study also contradicts research (Ferne & Metcalf, 1998) finding that call center management possesses full control over workers and operations.

Unlike prior research, these empirical findings demonstrated that resistance is not only intended to improve the individual situation (resulting in improved individual routine-based efficiency for a time), but



also aimed to satisfy customers (contributing to higher social efficiency). These findings extend prior research by Korczynski et al. (2000), Rosenthal (2004) and Townsend (2004) noting that resistance reflects a means to realize self-defined interests. This study is in line with research by Fernie & Metcalf (1998), Knights & McCabe (1998), and Winiecki (2009) that addresses resistance as escape routes and a way for workers to take control of their working lives. However, these spaces entailed a limited freedom within the prevailing system of work. Following research by Rowe et al. (2011) and Taylor et al. (2002), these findings also showed that work and workplace experience facilitated the exploitation of weaknesses in the IT systems to circumvent procedures and routines. This also meant circumventing learning how to perform work effectively and in line with requirements. Experience can also contribute to knowledge and acts of work procedures outside existing rules. However, this study significantly differs from the research by Rowe et al. (2011) that associated experience with the IT systems in the call center with lower levels of efficiency. Instead, resistance resulted in higher levels of efficiency in my research, at least for a short time. Therefore, I suggest that resistance is a coping strategy that positively influences performance in terms of routine-based efficiency and social efficiency. This study contributes with a clarified distinction regarding the impact between resistance and performance, which is an under-analyzed topic in prior theory.

Given that coping through resistance was based on actions of manipulating scheduled time at work and functions in the IT systems, this research extends prior studies by Callaghan & Thompson (2001) and Taylor et al. (2002) regarding resistance in relation to technical manipulation, and Evenson et al. (1999), highlighting the overall importance of IT systems for reaching efficiency in call centers. This research particularly contributes with additional examples of how technical manipulation can be carried out in the call center.<sup>75</sup> This study also extends research by Knights & Odih (2002) that acknowledges resistance based on exploitation of time in relation to coping. As Zuboff (1988) suggests, resistance reflects opportunities to add value, content, and meaning to work by technically manipulating the system. Based on these positive performance outcomes, I question why resistance in these call centers was regarded as unfavorable. Management might instead

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<sup>75</sup> For example, van den Broek et al. (2008) found that agents pressing the transfer button enabled additional time to complete their clerical work.

consider these acts to be positive from an organizational point of view, given that agents informally tried to compensate for the dysfunctions of the performance-management systems by acting in strategic ways that could result in more cost-effective ways to structure and carry out call center work.

In addition, the findings regarding this technical manipulation of work also further the macro-level approach of call centers by highlighting the impact of the socio-technical system on performance and behaviors, and the interaction between technology and people in this organizational setting (Callaghan & Thompson, 2001; Mandelbaum, 2003; Russell, 2008). Therefore, based on this analysis, this specific type of resistance should be acknowledged as a coping strategy that affects performance in the call center context. This contributes to call center research that has not been explicitly acknowledged in prior theory.

### *Coping strategy 3: Inward escape*

The coping strategy of inward escape refers to behaviors of escape from handling the ignorance of how to effectively perform work according to requirements. Given that this coping strategy was carried out for various lengths of time, the results revealed that inward escape is an ineffective coping strategy, both at the individual and organizational levels.

Inward escape has not been acknowledged nor addressed in prior call center studies. These findings are a new contribution. Inward escape as a coping strategy was highlighted within organizational behavior literature, such as by Noon et al. (2013), who associated the behavior to switching off, but did not problematize this concept further.

Regardless of the reasoning above, the effects of inward escape have often been emphasized in prior theory. The findings from this study align and extend the literature on burnout, specifically its origin. Unlike the dominating view, in which Holman (2003) and Tuten & Neidermeyer (2004) found that burnout is a direct implication of stress, my findings instead showed that burnout originates in the individual's lack of knowledge of how to perform tasks effectively (such as how to succeed with including a sales interaction in the customer call). Stress is a potentially perceived intermediate step between inward escape and burnout. These findings follow the logic in Deery et al. (2002) that assigns higher levels of emotional exhaustion to the length of tenure (in which agents with more tenure face higher risks of burnout).

These findings revealed that call center agents maintained their performance levels when adopting the coping strategy of inward escape (until a limit was reached). This study contradicts the dominating view within pessimistic call center studies that often finds a negative link between burnout and performance. For example, de Cuyper et al. (2014), Totterdell & Holman (2003), and Zapf et al. (2003) highlight burnout as contributing to a negative impact on performance in general and on service quality in particular. Similarly, Workman & Bommer (2004) address that tenure is associated with less effort spent on carrying out the individual work. This study did not find any of these implications to be valid. This study instead follows research that addresses maintained productivity levels among workers perceiving burnout (e.g., Singh, 2000).

In many ways, the coping strategy of inward escape was hidden (manifested through maintained performance levels). As a consequence, managerial support appeared after (physical and mental) expressions of burnout. Compared to Singh (2000) and Deery et al. (2002), in which managerial support is expected to shield agents from burnout, this study instead found post-burnout support. In this sense, managers were not helpful in avoiding the costs associated with burnout. Similarly, the empirical presentation showed no explicit indications that collaboration in the team helped colleagues against burnout, which conflicts with findings in Batt & Moynihan (2002) and McPhail (2002).

Moreover, these findings contribute to research within HRM and performance-management literature regarding well-being. This study followed suggestions by den Hartog et al. (2004) to examine well-being to understand its effects on performance. For example, although the use of the coping strategy of inward escape was associated with psychological functioning in relation to work features, this study contrasts research by Biron & Bamberger (2010), who found a negative relationship between low well-being and the quality of customer service. This study follows research by Holman et al (2002), highlighting its negative impact on performance. Agents adopting the coping strategy of inward escape had lower abilities over time to carry out their work. Given that the coping strategy of inward escape is an unconsciously chosen strategy, these findings also acknowledge the complexity of managing individual well-being in call centers to optimize performance.

#### *Coping strategy 4: Physical escape*

The coping strategy of physical escape is an active, occasional, conscious escape from not being able to meet all demands of work. This is manifested through physical absence from work. My study revealed how colleagues compensated for the effects of others' physical absence (a less effective coping strategy at the group level compared to the individual level). This points to the importance of a group-based view of call centers, highlighting performance as a function of the group and the potential costs of organizing work in various teams.

Similar to inward escape, the coping strategy of physical escape has not been acknowledged in prior call center research. Although high absenteeism in call centers has been touched upon (Norman, 2005), absence has not been found to reflect a coping strategy in prior call center theory. However, call center studies emphasized other physical aspects and implications of the work, such as call centers' physical architecture (the *electronic Panopticon*; Fernie & Metcalf, 1998). However, these physical aspects have primarily not been analyzed from a worker perspective but instead from an organizational perspective, such as by addressing the *sacrificial HR strategy* (see Wallace et al., 2000). In cases in which research addressed the worker perspective, physical aspects of work were mainly discussed from a work-health perspective, such as work ergonomics' negative impact upon the physical health of employees (Bain & Taylor, 2000; Chevalier et al., 2011; Subbarayalu, 2013) and overall physical well-being (Koskina & Keithley, 2010; Norman et al., 2004; Norman, 2005). The results from this study pointed at physical escape as a deliberate coping strategy when temporarily escaping from handling ignorance of how to carry out the work according to requirements. This is supported by a dysfunctional performance-management system. Given that physical escape has not been acknowledged as a deliberate strategy for individuals to use in their work, these findings make a contribution to cognitive call center research. However, these results follow organizational behavior research by Noon et al. (2013) in their descriptions of employees as distanced from their work, such as by mentally escaping or quitting the job, or (in line with this study) being absent from work. This deliberate coping strategy entailed additional organizational costs in terms of lower routine-based efficiency at a group level.

### *Coping strategy 5: Avoidance*

The coping strategy of avoidance is an individual behavior of consciously, temporarily avoiding facing the problem of performing below requirements. Avoidance was an effective coping strategy for the individual in the short term, but was less so in the long term. These performance effects have not been acknowledged in relation to avoidance in prior call center studies.

Prior call center research primarily highlighted avoidance in descriptions of to how agents manage their work, in which avoidance of certain categories of customers prevailed in relation to technical manipulation (Callaghan & Thompson, 2001; Taylor et al., 2002). Avoidance was also accentuated in relation to stress, in which the dominating view, such as Armony & Gurvich (2010) advocate, describes various ways for workers to avoid stress. However, avoidance as a coping strategy was acknowledged in prior call center research. Weatherly & Tansik's (1993) described avoidance as a coping strategy for handling unfavorable situations, which was also found in this study. Mahesh & Kasturi (2006) also highlighted avoidance in relation to high levels of stress, which reflects a type of coping management while also being a strategy distinct from coping. According to this understanding, a person can either cope (deal with) or avoid (not deal with) a problem. Although these findings followed this definition of avoidance, the findings in this study differed regarding how avoidance is related to the concept of coping. In this study, workers coped by avoiding. This study also contrasts to research by Baranik et al. (2014) and Goussinsky (2012) that highlights this coping strategy as behavioral disengagement. Although call center workers were not engaged in solving a perceived problem, they still engaged themselves to avoid facing problems based on their lack of knowledge. This study extends prior findings of coping in call center research by acknowledging avoidance as a coping strategy to be consciously used against perceived challenges.

### *Coping strategy 6: Blaming*

The coping strategy of blaming was manifested as blaming other people, objects, or/and conditions in the workplace to explain failures in reaching individual performance targets. Coping by blaming was an effective strategy for the individual, but less effective from a performance and group-based perspective. Individual performance declines must be compensated on a group level.

Blaming has not been acknowledged in prior call center studies. By recognizing blaming as a way to escape from dealing with a perceived problem, this study provides new insights regarding individual- and group-based performance in the call center setting. Blaming is a rather expressive coping strategy, thereby extending research by Sczesny & Stahlberg (2000), highlighting coping in relation to call centers (although their study was based on the coping strategy of confronting the harasser on the phone, the nature of these coping strategies still somewhat resemble each other). In that sense, blaming also reflects low commitment to work, as well as toward facing the problem of lack of knowledge.

### *Coping strategy 7: Pausing*

In my study, the coping strategy of pausing represented occasional escapes from solving perceived issues at work (high work pace, handling different customers and errands, including various components in interactions, facing poor sales performance, and having too few breaks). Pausing was manifested as micro-pauses during work (scheduled time). Interestingly, these pauses were sanctioned by management and were a legitimate coping strategy.

In my findings, breaks (scheduled, legitimate breaks) were distinct from (micro-) pauses (unscheduled, illegitimate breaks). The difference was that breaks were taken collectively while micro-pauses were generally spent in solitude. Prior theory generally understood pauses as a phenomenon in relation to time, rather than as structure (Ellis & Taylor, 2006). In addition, prior research addressing pauses and breaks in call centers predominantly viewed pausing from a pessimistic, worker perspective. For example, Bain & Taylor (2000), Norman (2005), and Taylor & Bain (2001) characterized call center breaks as infrequent or/and short. Ellis & Taylor (2006), Frenkel et al. (1998), and Houlihan (2001) instead approached breaks in relation to control and surveillance (such as toilet breaks). Given that my findings show that agents using the coping strategy of pausing perceived difficulties in effectively executing their work, my study is in line with the logic of the pessimistic view of call centers. However, in my study, pausing derived from a lack of knowledge and opportunities to exploit the performance-management systems, rather than explicitly perceiving time constraints in the work environment (the contextual element of time will be further analyzed in Chapter 8.1.2).

Given that my findings showed that technology enabled workers with spaces for pauses (for themselves or with others), this study also follows

research by Callaghan & Thompson (2001) and Taylor et al. (2002) regarding the use of technology. My findings illustrate that pauses were not primarily aimed at opposing managerial control, but rather to escape dealing with a perceived problem as a legitimate escape route. In this sense, coping by pausing does not reflect an act of resistance. Since these micro-pauses were enabled through certain freedom within the work, which follows Sawyerr et al.'s (2009) suggestion for workers to informally design their own break policy as a way to solve stress, my findings downplayed the pessimistic view that the call center work environment is strictly controlled. The findings in this study contribute by making a more explicit distinction regarding the meaning of individual and collective pauses in the call center setting and their potential negative effects on organizational costs.

Although pauses and breaks were highlighted in prior studies, no clear links between breaks/pauses and performance have been illuminated in prior theory of call centers. Nevertheless, based on a job-stress perspective, breaks were addressed by Sharma et al. (2011) to likely have a negative impact on call center agents' productivity levels. This argument is strengthened in my findings. My findings also add to this by making a clarification of the impact on the individual and group levels, depending on the type of interaction carried out during these pauses. More specifically, this study distinguishes performance impacts from both types of breaks/pauses (impeded levels of routine-based efficiency of the coping and interacting agent, lower individual problem-solving efficiency). It also clarifies that the performance impacts are influenced by the frequency and length of these pauses. Based on empirical findings showing certain tendencies in behaviors, as well as the variety of pauses, in terms of frequency and length (in minutes and seconds), my study also nuances prior findings (Jouini et al., 2008; Piercy & Rich, 2009). This assumes that call center agents are homogeneous, and equally perceive the work context and the need for pausing.

My findings also revealed that the absence of pauses entailed higher levels of sick leave for agents. This follows research by Deery et al. (2002) and Norman (2005), who found that breaks in relation to stress due to time constraints affected both physical and mental health (such as psychological problems, sick leave). These findings highlight the importance of managerial awareness of keeping a balance between higher costs for sick leave (by not allowing pauses) and lower levels of routine-



based and problem-solving efficiency in the work group (by allowing pauses) from the coping strategy of pausing.

### *Coping strategy 8: Prioritizing*

The coping strategy of prioritizing represents behaviors based on time allocation during the interaction with customers (compared to the coping strategy of pausing). The coping strategy of prioritizing was carried out by agents who lacked knowledge of how to effectively perform various parts of their work simultaneously.

Call center research has widely addressed the fact that call center agents consciously, and rather actively, make choices to prioritize between different targets and performance metrics at work. For example, Chevalier et al. (2011) described that call center agents must prioritize between targets, since the call center context includes a variety of targets (goals) that agents perceived as conflicting. This trade-off has also been referred to as an *internal challenge* between quantity (maximizing the number of calls answered) and quality (making customers satisfied) (Callaghan & Thompson, 2001; Gilmore, 2001; Jasmand et al., 2012; Rafaeli et al., 2008; Raz & Blank, 2007). My findings revealed that agents prioritize between targets by allocating time to reach one or several of them. This is a suboptimal practice from an organizational point of view. Following Armony & Gurvich (2010) and Chevalier et al. (2011), these findings suggest that prioritizing between targets happens because various types of errands require varying effort and time to solve. Therefore, these findings revealed that an underlying tension between targets in the call center context does not exist *per se*, compared to the predominant view (Fleming & Sturdy, 2011). Instead, the underlying tension between targets derived from agents' lacking knowledge of how to execute work tasks and allocate time between different parts of the customer interaction (which contributes to perceiving tension between targets). According to these findings, tension (and stress) are a consequence of not having enough knowledge of how to perform effectively. These findings nuance prior studies that simply characterized tension between goals as a fundamental part of the call center work.

From a managerial perspective, Aksin et al. (2007), Callaghan & Thompson (2001), Houlihan (2001) and Korczynski (2003) found that middle managers in call centers are required to acknowledge the agents' struggle to meet various targets on a daily basis (which Houlihan, 2001 pessimistically referred to as *smoothing chaos*). These findings emphasize



the importance for middle management to identify training needs among the agents (Armistead et al., 2002; Mahesh & Kasturi, 2006). More specifically, my study showed that middle managers primarily focused on handling the consequences of the agents' lack of knowledge (by managing how the coping strategy was carried out and its effects), rather than trying to solve the underlying cause of the behavior (lack of knowledge). This managerial approach was used for all adopted coping strategies. Managerial actions for handling the impacts of coping strategies relied on fast solutions, and short-term managerial thinking (Houlihan, 2001).

Prior call center literature identified prioritizing as a coping behavior, specifically in relation to time-based coping strategies, such as to exploiting time by accelerating work processes (Knights & Odih, 2002). This description of coping is clearly in line with the findings in this study, which found that some agents prioritized routine-based efficiency rather than service by speeding up customer interactions. However, Knights and Odih's description of this time-based coping strategy was based on the interpretation that prioritizing reflects a subtle form of resistance. My study did not reveal such a connection. Instead, prioritizing as a coping strategy reflected actions of avoidance to gain the knowledge required for being efficient and providing high service. Coping by prioritizing did not oppose management or managerial rules, so it did not reflect resistance. An informal practice, such as the coping strategy of prioritizing, cannot be just regarded as resistance because it deviates from organizational rules.

Moreover, prioritizing as a coping strategy follows the dominant view in call center research that call center agents generally sacrifice customer service in favor of quantity and short-term results (Knights & McCabe, 1998; Wickham & Collins, 2004). These findings follow the logic addressed in Armony & Gurvich (2010) and Batt & Moynihan (2002) that agents most often sacrificed targets that were considered more time demanding (satisfying customers). My results also provided fine-grained insights regarding how agents prioritized between performance metrics within the performance category of social efficiency (sales rates and customer satisfaction ratings), in which agents with long tenure most often prioritized customer service above aiming for high sales rates. The scope and frequency of utilizing this coping strategy could influence the organization's levels of sales revenues. In addition, coping by prioritizing between routine-based efficiency and problem-solving efficiency was not acknowledged in prior literature. More specifically, prior studies have not clearly acknowledged the distinction between problems and errands in the

call center context. This study contributes with insights regarding how agents prioritize between various objectives. Aksin et al. (2007) addressed these implications as under-analyzed in prior studies of call centers. More specifically, my study also showed that prioritizing varied between agents (new agents were generally more focused on efficiency and sales, whereas experienced agents prioritized satisfying customers). This finding has been broadly overlooked within prior call center research.

### *Coping strategy 9: Resignation*

The coping strategy of resignation reflects a behavior of distinct low motivation for learning how to handle perceived problems at work. In this study, resignation manifested by acceptance of the inability to learn how to carry out all parts of the call center work according to requirements.

Resignation has not been acknowledged either as a behavior or a coping strategy in prior call center research. My study found that the coping strategy of resignation is a complex behavior, given that agents using this coping strategy showed commitment to performing well within areas of their expertise (customer satisfaction, problem-solving) but low commitment within areas perceived as challenging (sales, efficiency). The general view of commitment as reflecting a willingness to be committed to work (Peccei & Rosenthal, 2000; Yoon et al., 2001) was not entirely met in this study. The coping strategy of resignation instead reflects partial commitment to work.

My findings also found that primarily experienced agents with tenure utilized the coping strategy of resignation. Prior research addressing tenure in call centers predominantly pessimistically described agents with tenure to perform poorly within areas that require efficiency (routine-based efficiency) (Batt, 2000; Castilla, 2005; Deery et al., 2002). My study also followed this logic. This finding contradicts research advocating the opposite impact (Mahesh & Kasturi, 2006), which strongly implies that utilizing the coping strategy of resignation impedes the organization's sales revenues. My findings also follow research highlighting the link between tenure, and behavioral and interpersonal skills needed in the call center context to enable high customer satisfaction (see Fleming & Sturdy, 2011; Moshavi & Terborg, 2002; Rowe et al., 2011). This implies there may be maintained service benefits from the coping strategy of resignation. Coping through resignation entailed agents to perform with high service levels, given their overall knowledge of how to solve problems with high quality, which also

resulted in high levels of customer satisfaction rates. This study found that agents adopting the coping strategy of resignation could still perform well within areas for which they possessed developed skills. Therefore, these findings contribute a more detailed view of the links between worker commitment, tenure, and performance. Prior call center research is vague (see Plakoyiannaki et al., 2008; van Jaarsveld et al., 2010; Yoon et al., 2001).

This study also revealed how colleagues compensated for the effects of others' use of the coping strategy of resignation. This coping strategy was less effective at the group level compared to the individual level. This finding points out the importance of a group-based view of call centers, highlighting performance as a group function. This study also revealed the dual role of middle management for handling call center agents who adopted the coping strategy of resignation. More specifically, middle management tried to spur workers' motivation for performing well while also spurring them to quit their job. These actions both aim to keep costs low for managing customer relations. This dual managerial role is broadly overlooked in prior call center research.

### **8.1.2 Analyzing the contextual elements influencing performance at Eon CS**

In my analysis of the two call centers, I found that several contextual elements were important for adopting the coping strategies analyzed above, which influenced performance. In this study, *contextual elements* refer to phenomena embedded in the call center context. This study acknowledges the critical role of context regarding workers' behaviors and organizational outcomes. Ellis & Taylor (2006) noted that this concept has generally been ignored in prior call center research.

#### *Time as a contextual element influencing coping strategies*

My findings showed that time had a significant impact on the use of coping strategies that influenced performance. Although the concept of time has been acknowledged in prior call center research, studies regarding its impact on coping in the call center context are very limited. Knights & Odih (2002) highlighted that call center workers exploited time by accelerating work processes (included in prioritizing). However, prioritizing was not the only coping strategy that depended on the use of time. As in Armony & Gurvich (2010), Chevalier et al. (2011), Erez

(1990), and Witt et al. (2004), my findings found that is important to understand from a worker perspective. This includes workers' perceptions of time, and how they allocate and try to control their work time. For example, time was important for the frequency and duration of pausing, and the allocation of time during customer interactions (prioritization) that influenced performance. Allocating and controlling work time were also important for the coping strategy of resistance (manipulating work time), internal knowledge sharing (time-efficient learning practice), blaming (insufficient time for carrying out the work), and physical escape (time off work). However, compared to Erez (1990) suggestion that workers should be trained (by management) to develop better strategies for using work time, these findings showed that agents instead developed these time-based strategies themselves or in conjunction with colleagues.

Prior studies have most often addressed time in relation to descriptions of the call center tasks, various work conditions (full-time/part-time workers; Holman et al., 2007, Shire et al., 2009), and constraints. The basic assumption in research advocating time as constraining (Lin et al., 2009; Sawyerr & Srinivas, 2007) is that call center agents face time pressures on a daily basis. In this sense, time is perceived as stressful *per se*. This critical perspective of time partly ignores that agents perceive time differently. My findings correspond with prior studies addressing that agents perceive a lack of time between customer calls (Ellis & Taylor, 2006; Norman, 2005) and generally perceive themselves not having enough time to get the work done (Zapf et al., 2003), manifested in the coping strategy of blaming. However, these studies only barely scratch the surface of why time is perceived as constraining and stressful. In this study, I expand and further insights of coping as a stress-management tool. My findings showed that call center agents perceived stress as generated by not having appropriate knowledge of how to carry out their work in accordance with requirements. These individuals had not been coping enough to know how to handle perceived problems effectively. These perceptions were also heightened by dysfunctional performance-management systems, such as lack of consistency in terms of shifting requirements for performance. These findings highlight that middle managers must identify training needs for the agents (Armistead et al., 2002) to keep organizational and personnel costs low for sick leave and other types of absence from work related to stress.

### *Raising the importance of learning as a contextual element*

This study categorizes *learning* as a contextual element that is primarily embedded in the call center context and situated in relation to work routines and structures (instead of reflecting an organizational or cultural element, although the coping strategy of internal knowledge sharing also reflects organizational culture).

Following prior research on learning in call centers (e.g. Callaghan & Thompson, 2002; Houlihan, 2002; Raz, 2007), my findings showed that the initial training period for the work only superficially taught the basic principles of working effectively (such as company products, systems, and procedures). New agents also learned by engaging in the IT systems and the company knowledge base, which is also in line with prior call center studies acknowledging that learning occurs during work time,<sup>76</sup> given various customer inquiries (Batt & Moynihan, 2002; Rowold, 2007). However, the finding that learning occurs during work time is often overlooked in prior studies. The predominate view in prior call center studies, as Batt & Moynihan (2002), Callaghan & Thompson (2002), Houlihan (2001) and Korczynski (2002) describe, is that the call center work is carried out by reading from pre-determined scripts that all agents follow, since there are a large number of recurring customer inquiries. These scripts can be followed without any specific mental presence (Collinson, 2003; Rosenthal, 2004). My findings instead revealed that call center agents must learn how to find and follow the large number of routines that exist (in the knowledge base) for the various types of errands that agents may face. These demands were also amplified by the fact that routines did not exist for all issues the agents were faced with solving. This overall follows research by Rafaeli et al. (2008) that scripts are rarely complete, since customer service interactions are never entirely controlled. I suggest that call center agents still need to learn their work, even though call centers operate by utilizing scripts. This applies for the tasks and errands included in scripts and deviating issues (problems). In this study, how call center agents undergo this learning process affects performance.

Unlike prior research by Cameron (2000), Rupp et al. (2008) and Witt et al. (2004), my research showed that scripts were not linguistically or

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<sup>76</sup> Job rotation did not frequently occur in these call centers, which is also why this study, compared to research by de Ruyter et al. (2001) and Pinker & Shumsky (2000), found no explicit impacts on performance.

emotionally regulated regarding tone in customer interactions. These findings nuance the emphasis in prior research on scripts as a restraining practice. My findings showing that emotions were not regulated in scripts further downplays the generally pessimistic view of customers described by Archer & Jagodzinski (2015) and Skarlicki et al. (2008) that customers in general are abusive over the phone.

#### *Acknowledging variance and heterogeneity in the call center context*

This study revealed the need to master all tasks at the call center sufficiently to achieve overall high performance levels. This finding follows the predominant view in prior research that call centers operate with a work design by using high level of general and explicit skills (Rose & Wright, 2005). However, this study also acknowledges the differences between agents, in terms of their knowledge level and the type of skills they possess. For example, temporary agents tended to possess low skills within problem-solving but more developed sales skills, which made them efficient and well-performing within sales (socially efficient). More experienced agents with tenure had well-developed tacit and specialized skills that let them perform well within other parts of the call center work (such as customer satisfaction, problem-solving). These findings follow research by Chambel & Alcover (2011), Holman et al. (2007), and Raz & Blank (2007) regarding the positive link between temporary agents and routine-based efficiency. This highlights that the employment condition (rather than age; Rowe et al., 2011) spurred high levels of efficiency in routine errands. Previous research explains this phenomenon as a result of agents being eager to get a full position. The findings also follow the dominant view in prior research that experience with call center work is negatively related to routine-based efficiency. Contradictory to research by Mahesh & Kasturi (2006), my findings showed no manifestations that tenured agents generally possessed knowledge of how to be more efficient in their work. Instead this study follows research by Higgs (2004), addressing the positive link between experience and service quality. This contributes insights regarding this performance implication, which has rarely been examined in prior research. Finally, these findings also follow research by Grugulis et al. (2004), emphasizing that all call center agents must possess tacit social skills (being able to place oneself at the customer's level and listen in to what the customer wants help with), since call center agents' main task is to interact with customers over the phone.

Rather than contributing to research advocating either up-skilling (Batt, 2002; Bordoloi, 2004) or de-skilling (Rose & Wright, 2005; Russell, 2002), my findings instead nuance the under-analyzed discussion of skills (as noted in Grugulis & Stoyanova, 2011). This study acknowledges the variance of work tasks over time and the workday, and the heterogeneity of skills within a low-skilled organizational setting in relation to performance. These findings contribute insights that varying levels of skills between agents are further reinforced by making different priorities in their work (when using the coping strategy of prioritization).

Furthermore, my findings point to the distribution of work based on the logic in which all call center tasks are aimed to be solved within a work group (team). Following research by Nyberg & Mueller (2009), my findings also showed that incoming calls were mainly routed to any available agent, rather than an agent with appropriate skills for that specific type of errand. The work design basically demanded that agents within a work group compensate for colleagues skill levels and performance levels. These findings provide further insights regarding the group-based perspective in relation to performance in call centers and that the distribution of work contributed to the use of various forms of coping strategies among the agents. Given that the agents possess various levels and type of skills, these findings are also in line with research by Pinker & Shumsky (2000) by acknowledging the importance of utilizing the right balance of specialists and generalists within a company. The work design in these call centers directly influence the organization's levels of sales and service benefits. Since the work groups in these two call centers differed, this study also nuances the predominate picture that call centers operate with homogeneous work groups.<sup>77</sup>

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<sup>77</sup> This variation can be further emphasized by noting that certain basic elements are in line with the general view of in-house call centers, primarily regarding the fact that the majority of agents were female (Batt et al., 2009), whereas other elements slightly differed compared to the general picture. For example, the average age (25 to 30 years old in Norman, 2005; approximately 36 years old in these two call centers), and the percentage of temporary workers (29 percent to 40 percent in Holman et al., 2007, and approximately 20 percent temporary workers in the two call centers) slightly differ to the general view of in-house call centers. These differences are also derived from the specific context of this study (in-house, front-office operations, separated from back-office operations, mainly operating inbound calls from B2C customers).



### *Re-defining decisional power in the call center structure*

This study contrasts prior call center research addressing that the flat organizational structure (machine bureaucracy as described by Mintzberg, 1983) that prevails in call centers reflects a high-involvement work environment (serving customers by relatively highly skilled agents) (Batt & Moynihan, 2002; Workman & Bommer, 2004). However, my findings showed no clear indications that top management aimed to organize the work structure to allow agents to make decisions in their work. This study instead revealed that agents, to varying degrees, perceived a possibility to influence their everyday life by making decisions in relation to their work tasks (such as which coping strategy to use). This logic is related to the concept of empowerment. Following research that call centers operate with high internal flexibility, given that calls are spread over a large number of temporary and part-time workers (Armony & Gurvich, 2010; Batt & Moynihan, 2002; Moss et al., 2008; Rose & Wright, 2005; Russell, 2008), these findings highlighted an additional form of internal flexibility in terms of developing and using coping strategies. The performance-management systems for these call center operations can be used for various purposes. Apart from providing managers with tools for measuring performance, these systems also allowed agents to exploit certain degrees of freedom in their work to some extent.

Despite operating with a top-down structure, high levels of formalization and functional specialization (scheduling daily activities and working according to pre-set procedures), and rather standardized output (using targets within each performance metric), my findings revealed that work processes and behaviors could not be completely formalized or regulated. The activities carried out in the two call centers did not perfectly align with the general understanding of the machine bureaucracy. Therefore, this study contradicts Bohle et al.'s (2011) description of call centers having a structure based on tight control. Certain created freedom in the work was reinforced not only by operating with centralized decision-making, but primarily with decentralized decision-making. For example, top management decided the direction of the business and accompanying operations in the call centers (when top management enhanced the sales focus, which directly affected workers). Decentralization was prevalent when the division manager and middle managers exercised formal power that influenced operational decisions (Adria & Chowdhury, 2004). Given that coping strategies were developed and used, these findings also follow research stating that agents possess certain informal powers to make



decisions during the customer interaction (Adria & Chowdhury, 2002; Collin-Jacques & Smith, 2005; Thompson et al., 2004). However, my findings extend this research by also acknowledging agents' power during their overall time of work in relation to the customer interaction, before and after the customer interaction, and during the workday. This expression of power is partly represented in the development and adoption of the various coping strategies. These findings contrast research by Bohle et al. (2011) and Grebner et al. (2003) that downplays agents' power and influence over their work.

These findings are also closely related to agency theory, specifically to the breach of contracts (Fama, 1980; Jensen & Meckling, 1976). Although agents' contracts had a close relationship between incentives, compensation, performance measurements, and agents' detailed job descriptions (such as the ruler), this study found that both agents and principals breached their contracts. For example, top management breached their contract with agents by changing the performance measurement and the incentives, and including sales in agents' contracts without consent. On the other hand, the call center agents found incomplete contracts that were exploited by not performing better than expected and sometimes even lower than expected (escaping), ignoring instructions to sell all products for which they were assigned, and somewhat detracting from their detailed work schedule. In these cases, agents acted according to their own interests and values that were not optimal from the principal's viewpoint. It can be implied that the principal's breach spurred agents' actions of not acting entirely in accordance with the terms of any contract. This resulted in none of the actors following the original agreement. Instead, both actors pursued some form of tacit agreement that allowed them to exploit their degrees of freedom. These informal behaviors at work are an invisible game in which both parts play by their own rulebook under the radar of the more formal rules.

The agents were more knowledgeable than the middle managers of how to carry out call center tasks, which also represent a form of information asymmetry between management and agents. These findings suggest that managers could further exploit this information asymmetry to enable more efficient work procedures. For example, instead of punishing agents for making shortcuts in their work (resistance), management could first consider these actions in the light of representing strategic (meaningful) shortcuts.

My findings also follow research showing that the flat organizational structure in call centers limits workers' opportunities for career development (see Deery & Kinnie, 2002; Rose & Wright, 2005). This was especially evident regarding the coping strategy of resignation. Agents' willingness to gain appropriate knowledge for performing in line with requirements was also low because there were limited career and promotion opportunities in the call centers. In the light of this coping strategy and the flat organizational structure, the benefits of managing customer relations through call centers could be limited, since the costs for retaining these agents were actualized by moderate revenue (given overall low sales rates).

Furthermore, my findings follow prior research that emphasizes the worker perspective in relation to organizational changes. Agents with a great amount of experience with call center work primarily perceived the nature of work being transformed from customer service into target-centered, sales-driven operations when the organization changed over time. These findings are in line with prior call center research that addresses a change of focus from customer service to sales reflected in workers' perceptions of increased work pace and higher levels of stress (Bain et al., 2002; Houlihan, 2002; Lin et al., 2009; Wallace et al., 2000). Following research finding that implementing sales in the agents' daily work is an internal challenge (Downing, 2011; Jasmand et al., 2012), I discovered that this perceived challenge also resulted in various coping strategies (inward escape, physical escape, pausing, resignation) and, ultimately, additional human and organizational costs.

### **8.1.3 Analyzing the control-based elements influencing performance at Eon CS**

I found that several control-based elements were important in the call center setting, since they influenced performance through the use of coping strategies. In this study, *control-based elements* refer to phenomena based on or reflecting control in the call center context.

#### *Raising the importance of control perceptions in the call center setting*

Similar to the general view of call centers (Bain et al., 2002; Belt et al., 2002; Callaghan & Thompson, 2001), my findings showed that various types of control were exercised in the two call centers. For example, direct and indirect bureaucratic control (universal displays of individual

performance, performance monitoring, and listening in practices) prevailed in these call centers. Output control and certain cultural control (further analyzed in Chapter 8.1.4) were carried out in this case context. Surprisingly, my research pointed at low levels of perceived coercive control. Although agents faced time-based targets and timed work activities, they were not timed during their legitimate breaks. More importantly, agents did not perceive themselves as under pressure of coercive control. My findings contrast with prior call center studies advocating the coercive nature of control (Belt et al., 2002; Callaghan & Thompson, 2001; Taylor & Bain, 1999, 2001). Parts of the explanation could be in the lack of explicit manifestations of management supervision and technological surveillance (in terms of keystrokes and silent monitoring). Another potential explanation is that the information and communication technologies were used by both management and agents when carrying out their coping strategies (such as resistance and pausing). These findings broaden our understanding of info-normative control (Frenkel et al., 1999) by acknowledging variations of individual perceptions of control (D’Cruz & Noronha, 2007; Holman et al., 2002; Sewell et al., 2011; Stanton, 2000).

*Downplaying the importance of rewards for performance in the call center context*

Similar to the predominant view in prior call center research (den Hartog et al., 2004; Hausknecht & Trevor, 2011; Mulholland, 2002; Sewell et al., 2011), my findings showed that work activities were operated, measured, and evaluated by established performance metrics (KPIs) and targets. My findings also showed that management’s primary aim with pre-determined targets was to reinforce and centralize target attainment to ensure that goals were reached. Middle management was specifically aimed at coordinating agents and their efforts effectively through a large span of control. This coordination was handled by communicating and contextualizing the organization’s strategy, such as by re-interpreting organizational goals to make them relevant for the agents.<sup>78</sup> These activities were also supplemented by additional managerial support to the agents (providing attention, recognition, and motivational triggers), which

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<sup>78</sup> Based on the agents’ and (to some extent) middle managers’ views, the operational supports were not either physically present or supportive for the agents, so were downplayed in this analysis.

is overall in line with prior call center research (Bohle et al., 2011; Mahesh & Kasturi, 2006).

In these regards, my findings are in line with prior studies highlighting the link between targets, control, and the managerial role (Arzbächer et al., 2000; Houlihan, 2001; Rowe et al., 2011). However, my study revealed that the motivation for reaching targets and/or the reward<sup>79</sup> system varied but was overall low from the agents' perspective. This was especially evident, since not all agents were aware of the targets they were expected to meet. Additionally, since experienced agents helped less knowledgeable agents, helpfulness was not perceived as rewarded and contributed to lower levels of routine-based efficiency. Failing to reach internal targets spurred the use of coping strategies (prioritization, pausing, and resignation). My research questions the current assumption in theory that rewards are a great source of motivation and commitment for call center agents (Holman et al., 2007; Malhotra et al., 2007; Rowe et al., 2011). I found that extrinsic rewards are not enough compensatory mechanisms for motivating agents to perform well. This undermines the entire rationale for using performance-management systems. In some regards, the performance-management systems utilized to control and predict performance is dysfunctional for management, since the systems failed to ensure that the estimated costs for managing customer relations were followed. In addition, while downplaying the importance of rewards in this organizational setting, my findings acknowledged the importance of goal orientation to perform well. This follows research by Janssen & Van Yperen (2004).

### *Emphasizing internal alignment between goals in the call center context*

Following the logic presented above, my study questions the current assumption that operating with a large number of targets optimizes

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<sup>79</sup> These findings showed no evidence that collective extrinsic rewards were significant for the agents (since their occurrence in these call centers were infrequent and not influenced performance). This contradicts research by Frenkel et al. (1998) and Rowe et al. (2011) that collective bonuses influence agents' performance to a higher degree than individual bonuses. I also did not find evidence that the reward structure was used as a provocative tool within sales to counter willingness for colleagues to succeed or to undermine collaboration. This contrasts with research by Batt & Moynihan (2002) highlighting that individual sales rewards pitted workers against each other. This study found no clear manifestations regarding the association between intrinsic rewards and performance. This follows prior research (Malhotra et al., 2007) regarding the low impact of intrinsic rewards for performance in this context (job satisfaction is further analyzed in Chapter 8.1.4).

performance in the call center context (Hausknecht & Trevor, 2011; Sewell et al., 2011). Call center research most often attributes organizational success to the use of a number of various targets (den Hartog et al., 2004). My findings instead showed that the two call centers operated with a poor alignment between the organizational performance-management systems (internal targets and incentives) and the overall business strategy (the company's external vision). This again highlights the dysfunctional performance-management systems utilized in the call centers. Although there were attempts to align these goals, internal performance did not reflect external measurements regarding service levels.<sup>80</sup> These findings acknowledge that reaching internal targets (such as customer satisfaction) did not necessarily imply that customers were in fact satisfied with the customer service.

My findings revealed that the poor fit between the external and internal view of the company was reinforced through a managerial goal hierarchy while increasing the number of targets for the agents over time. Given that middle management emphasized efficiency, and productivity-based targets over service quality and customer satisfaction, this study is in line with research highlighting that maximizing efficiency and productivity is often emphasized in the call center context (see Dean & Rainnie, 2009; Winięcki, 2009). This study is also in line with research stating that call centers are pre-occupied with targets, rather than with customer service (Rafaeli et al., 2008; Robinson & Morley, 2006; Rowe et al., 2011). My findings also agree with research acknowledging the managerial power to influence worker behaviors in making decisions (see Renn & Fedor, 2001). All in all, a pre-occupation with targets that are poorly aligned and supported by a dysfunctional performance-management system implies poor conditions to succeed at obtaining desirable service benefits.

#### **8.1.4 Analyzing the cultural elements influencing performance at Eon CS**

In the analysis of the two call centers, I also found that cultural elements influenced performance through the use of coping strategies. In this study, *cultural elements* refer to a set of taken-for-granted assumptions, shared

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<sup>80</sup> The customer satisfaction rates for B2C customers measured within the company increased year by year, whereas the external scores from SQI measurements reflected scores below the industry average and a decline between 2013 and 2014 (see Chapter 5.1.1).

beliefs and meanings that form a backdrop for action in organizations (as defined by Smircich, 1985).

*Coercive cultural control of values in the call center context*

My findings revealed that coercive cultural control in regard to shared values of company products prevailed in the two call centers. Middle management used discourses of distraction and managerial maneuvers to make call center agents disregard their values in their work. Middle managers attempted to form the call center agents' attitudes to fit the performance demands of the company (such as using agents' playfulness in competitions). This finding is similar to Fleming & Spicer (2004), Russell (2002), and van den Broek et al. (2004), which are also in line with pessimistic descriptions of normative control in call centers (see Deery & Kinnie, 2002; Fleming & Sturdy, 2011). Managerial efforts to shape values were primarily aimed toward making agents act as ambassadors for company products, rather than generating identification with the organizational goals. These findings follow research by Frenkel et al. (1998) and Hutchinson et al. (2000) acknowledging that call center agents must act as company ambassadors, since their close contact is critical for the entire business performance. My findings showed that this was highly valid for social efficiency (sales).

Part of the explanation for coercive cultural control in relation to shared values could be that acting on shared values of company products was effective for the agents but not functional for performance in the group or the organization. Agents used their power to determine which sales products to offer customers (such as by using the coping strategies of avoidance and prioritizing). Given that values regarding company products were shared among a large number of agents, this study highlights that coercive cultural control was primarily used to reach internal sales targets. These findings are based upon the logic that middle managers considered (unfavorable) shared values of company products to impair the prospects for reaching internal sales targets at an organizational level. My findings also acknowledged that middle managers were required to disregard their own values in relation to the company products to act as company ambassadors for succeeding with spurring sales performance at a group level. This study showed that disregarding values enabled them to meet the demands from the divisional manager, which allowed them to obtain rewards. My findings highlight the significance of acknowledging

the meaning of products for sales performance, both from a worker and a managerial perspective.

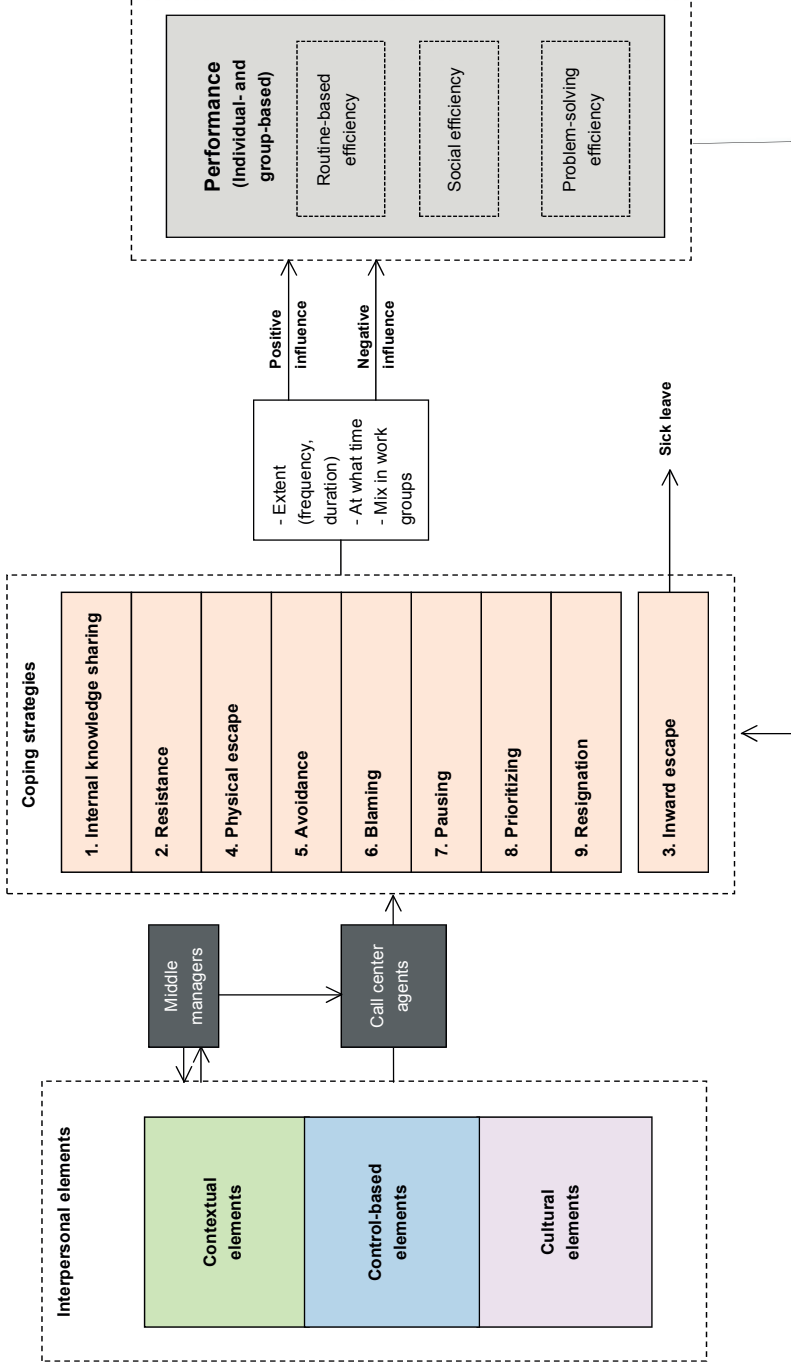
### *Emphasizing a broad understanding of work climate and performance*

My study found that call center agents developed a culture of fun (joking with colleagues and customers) that entailed a positive and social climate in the work group, which influenced performance through coping. This work climate is very much related to the concepts of *extraversion*, *personalization*, *positive attitude* and *job satisfaction*, which prior research linked with positive impacts on performance (see Batt & Moynihan, 2002; Desmarais, 2005; Fleming & Sturdy, 2011; Mahesh & Kasturi, 2006). Given that having fun in a social work setting entailed both improved (social efficiency, routine-based efficiency) and impaired performance (routine-based efficiency), depending on the extent of fun when carrying out the work, my findings highlight the complex relationship between extraversion and performance in the call center context. By including several clearly defined performance metrics in the study, my findings contribute to a broader understanding of the link between these concepts and performance than what prior call center research illustrated (see Sawyerr et al., 2009; Tuten & Neidermeyer, 2004; Witt, 2002). These findings also point at the importance of a group-based view of call centers, highlighting the cultural function of the group in order to understand the link to performance.

## 8.2 Revised theoretical framework

Figure 7 outlines a revised theoretical framework for the elements influencing performance in the call center context, based on the empirical findings of this study.

Figure 7: Relationship between interpersonal and individual elements in regard to the three performance categories: Revised theoretical framework





There are certain similarities between the preliminary theoretical framework (in Chapter 3) and the revised theoretical framework. As in the preliminary framework, my findings showed that contextual elements were important for call center agents' perceptions of, and motivation for, work. However, rather than highlighting the influence from stress (Holman et al., 2002; Wegge et al., 2006), this study found that the elements of time, learning, and decisional power influenced the use of various coping strategies. Variance and heterogeneity in the call center context also contributed in relation to the context. In addition, my study showed that organizational practices and work design matter in the call center setting, even though I included these concepts in the contextual elements. Finally, my findings also showed the process-based relationship between individual actions and performance.

However, I made four main changes to the revised theoretical framework compared to the preliminary one:

- 1) My findings showed that control-based elements are important in the call center setting, which include more than managerial practices addressed in prior theory.
- 2) My study found that cultural elements are more significant for performance than in prior research.
- 3) This study revealed that the use of coping strategies constitutes the main link to performance in the call center setting.
- 4) Based upon my empirical findings, the links to performance are refined, clarified, and carefully elaborated upon.

### **8.2.1 Control-based elements as antecedents to coping**

Compared to prior research, my study found that certain control-based elements influenced the extent to which call center agents used coping strategies to handle or not handle their lack of knowledge of how to effectively perform work according to requirements. My study contradicts research emphasizing that primarily managerial practices are important control-based elements in the call center context (Dean & Rainnie, 2009). This study contributes insights that perceptions of control and misalignment between internal goals are important for furthering our understanding of the call center context. Since the performance-management systems were dysfunctional in that they did not motivate all agents to perform well, this study also contributes with findings that call

for downplaying the impact of rewards for performance in call centers. This differs from the predominant understanding in prior call center research (e.g. Rowe et al., 2011).

Similar to prior research, managerial practices were important for the call center context. My findings showed that middle managers influenced agents' (and teams') behaviors and attitudes at work through various practices (such as providing feedback and support). This highlights the indirect (rather than direct) impact between managerial practices and performance in the call center context. This finding deviates from the preliminary theoretical framework, since it is only in line with research acknowledging the indirect impact on performance (Batt & Moynihan, 2002; de Ruyter et al., 2001; Holman et al., 2002; Rowold, 2008).

### **8.2.2 Cultural elements as antecedents to coping**

My study contributed to insights that cultural elements are more important for performance in the call center context than how prior theory has acknowledged. Similarly, the cultural elements in this study also influenced to what extent call center agents used coping strategies for handling or not handling their lack of knowledge of how to effectively perform work according to requirements. This study also contributed with insights regarding how coercive cultural control of values influenced performance in the call center context. My study also provided insights regarding the need to emphasize a broad understanding of work climate and performance to understand how work climate and performance are linked in the call center context. My findings regarding these cultural elements and their impact upon agents' use of coping strategies differ from the preliminary theoretical framework.

### **8.2.3 Coping as the primary link to performance**

The main contribution of this study is another main change from the preliminary theoretical framework. More specifically, my study revealed that coping and the effects of coping strategies upon performance constitute the primary link between the contextual, control-based and cultural elements, and performance outcomes in the call center setting. The nine salient coping strategies represent different behaviors that influence individual and group performance in various ways. The effects on performance are driven by the extent to which each coping strategy is

used (frequency, duration), when it is used (scheduled), and the mix of these uses in the work groups. The impact on performance further influences the extent and use of these coping strategies, which explains coping as the process call center agents undergo when learning a job.

Compared to the preliminary theoretical framework, coping was of significantly greater importance in the call center context than acknowledged in prior call center theory regarding the elements that matter for performance. The main emphasis in the analysis was on the individual agents, illustrated in Figure 7. The elements of individual motivation, capacities and psychological resources (stress management), personal characteristics, health, demographics and perceptions of stress were previously highlighted as important concepts for performance in the call center context (Biron & Bamberger, 2010; Renn & Fedor, 2001; Sawyerr et al., 2009). My findings instead found that these concepts were included within the discussion of the manifestations of coping strategies, which is a change from the preliminary theoretical framework.

#### **8.2.4 Studying proxies for performance**

A final change to the revised theoretical framework concerns performance and the links to performance in the call center context. First, the links to performance were refined, clarified, and analyzed in detail, compared to the preliminary theoretical framework to understand which elements influenced performance and how they did so. My findings found explicit (positive and negative) links between coping strategies and various levels of performance (individual- and group-based) and to various types of performance in the two call centers, which are presented in the revised framework in terms of the three performance categories (routine-based efficiency, social efficiency, and problem-solving efficiency). In particular, the category reflecting problem-solving performance came from my empirical findings and contributes a proxy for complex tasks that has generally been overlooked in prior call center studies (see Grugulis & Stoyanova, 2011; Renn & Fedor, 2001; Workman & Bommer, 2004). This type of performance is also a change in relation to the preliminary theoretical framework. Second, the outcomes in this study are proxies for performance from the perspective that achievements at Eon CS are systematically and consistently measured (at individual, group, and organizational levels), performance metrics that revealed certain patterns were analyzed. Based upon this logic, the metrics of absence, sick leave,

turnover and soft metrics (such as Right Mental Attitude) used in these two call centers (Table 22, Appendix 3) do not represent performance in this study. Therefore, these performance metrics are excluded from the revised framework in regard to performance. This is also a change from the preliminary theoretical framework.

On a more reflective note, utilizing various performance metrics and categories appears to constitute one method for establishing performance in the call center context. This method came about from aiming to measure performance by getting as close to call center operations as possible to understand Eon CS's reality, supported by the fact that these performance metrics are generally used for measuring and establishing performance in call centers worldwide. However, some of these metrics have certain limitations. For example, the performance metric of customer satisfaction is generally regarded to establish service quality in call centers. However, it only reflects one way to measure a specific form of service quality: Customers' opinions of how they were treated and how their issue(s) were solved. At Eon CS, these opinions were also categorized according to established rates provided by the company. According to my interpretation, supported by scholars such as Grönroos (1990), Parasuraman et al. (1985) and Svensson (2006), service quality is a multidimensional construct that covers many more aspects of the actual service interaction between the customer and the agent (such as timing, empathy, and adaptation) to better understand service quality performance in call centers. In this regard, I followed research by Batt & Colvin (2011) that acknowledge customer satisfaction as a result of customer service. Another example of limitations in how performance metrics are used concerns problem-solving skills. Agents' skills utilized in non-phone activities at Eon CS were measured according to an efficiency-based perspective. By following the same logic as above, this only reflects one type of problem-solving performance (how fast problems were solved). The essence of problem-solving should instead be emphasized, which optimally reflects a more quality-oriented approach.

Apart from contributing an in-depth analysis of the utilized metrics to provide an analytical overview of performance in the call center context, I also tried to link these proxies for performance to the ultimate objective within call centers, which is to reduce costs. These performance proxies in prior theory have rarely been linked or thoroughly discussed in relation to economic impact (Kim et al., 2005; Miciak & Desmarais, 2001). In this study, I analytically addressed implications on costs and revenue in

relation to the empirical findings, to understand these findings from a broader perspective.

### 8.3 Evaluating the link between coping and performance in the call center context

My analysis also progresses from the understanding that the nine coping strategies reflect more or less effective behaviors in terms of their impact upon performance. Following organizational behavior research (Noon et al., 2013) and prior call center research regarding the aim of coping (Geller & Bamberger, 2009), coping strategies can be evaluated as more or less successful in terms of their impact on performance. Based on how coping strategies influence performance, my research suggests that these coping behaviors should be evaluated from an organizational perspective, as either informal organizational behavior or organizational misbehavior.

Coping behaviors representing informal organizational behavior reflect behaviors that follow managerial rules and have a predominantly positive effect on performance. These criteria apply to four adopted coping strategies in this study: Internal knowledge sharing; avoidance; pausing (only regarding marginal efficiency declines); and prioritizing (only regarding short-term and occasional performance impacts).

Conversely, organizational misbehavior has been described as workplace deviance (Ackroyd & Thompson, 1999; Lim, 2002; Paulsen, 2014). Coping behaviors representing organizational misbehavior reflect behaviors in which call center agents do not follow managerial rules or/and behaviors are linked to significant negative impacts on performance. These criteria apply to six adopted coping strategies in this study: Resistance; physical escape; blaming; pausing (only regarding significant efficiency declines); prioritizing (only regarding long-term and systematic performance influence); and resignation. As noted, the coping strategies of pausing and prioritizing represent both informal organizational behavior and organizational misbehavior. The evaluation of these coping strategies differs based on the significance of the performance impact over time. The coping strategy of inward escape was not included in the evaluation of coping strategies, since it had no explicit impact on performance.

## 8.4 Chapter summary

This chapter provided an analysis of the empirical findings, coping, contextual elements, control-based elements, and cultural elements that influenced performance in this call center context in relation to prior theory. By analyzing the interpersonal elements and the individual element of coping, and their implications at the individual and group levels, a revised theoretical framework was formed (Figure 7) that furthers our knowledge of how to manage performance in call centers. The evaluation of the link between coping and performance in the call center context from an organizational perspective will serve as a guide for practical implications of the findings from this study. These implications, along with the conclusions of this study, will be discussed in the concluding chapter of this thesis.



# Chapter 9 | Conclusions

My study provides an in-depth analysis of the underlying elements and complexities of understanding performance in a call center context. Figure 7 in Chapter 8 clarifies the relationship between performance and contextual, control-based, and cultural elements. It also illustrates the mediating role of coping strategies for performance in a call center context. Figure 7 extends the cognitive call center research stream by making salient the importance of individual perceptions and subjectivity. Since these findings represent a contribution beyond the pessimist/optimist discussion in prior call center research, my study also primarily nuances and extends prior research regarding the impact of various elements and their links to performance in the call center context.

My study also provides a close examination of the impact of managerial practices in relation to teams in call centers. For example, my study found that middle managers could spur call center agents' use of coping strategies, which had an indirect impact upon performance. Following suggestions by Batt (2004), Consiglio et al. (2013) and Jackson et al. (2003), my study also acknowledged the dynamics of work groups, various behaviors and performance levels between individuals and teams, and the collective nature in call centers. This research contributes by furthering insights of both the individual- and the group-based perspective of call center work by combining the micro and macro perspective on performance in call centers. The analysis of the dynamics within teams not only met a demand within call center research, but also contributed to insights valuable for organizational behavior research (Noon et al., 2013). The theoretical implications of coping strategies as a mediator for performance are the most significant. The following text will elaborate further on this.



## 9.1 Coping as a mediator for performance

The main theoretical contribution of this study is based on the observation that coping is significantly more important for performance in the call center context than has been acknowledged in prior theory. My study follows a small but growing stream of research (Ashill et al., 2009; Barnes, 2005; Gnaur, 2010; Tuten & Neidermeyer, 2004) that has addressed coping in call centers.

Since individuals' demand to cope with a perceived problem is influenced by the amount of experienced coping over time, which varies between individuals (Harry, 2014), I found coping to be a subjective concept. Call center agents tried to informally compensate for dysfunctions of the performance-management systems by developing various coping strategies that, based on the inherent subjectivity, were carried out to various extent (frequency, duration) and at different times, which varied in the work groups. How call center agents handled their lack of knowledge of how to effectively solve (or not solve) a perceived problem determined individual- and group-based performance. This study extends prior coping research by explicitly linking the selected coping strategies to various performance outcomes (the three performance categories).

Compared to the psychoanalytical approach (Edwards, 1988; Mikkelsen et al., 2000), my study found no evidence that individuals choose either a problem-focused or an emotion-focused coping style (to handle either problems or emotions). Instead, my study found that individuals select a strategy for handling a perceived problem in different ways. In line with the psychoanalytical approach, I found that some coping strategies reflect more active behaviors of dealing/avoiding dealing with a problem (internal knowledge sharing, resistance, physical escape, avoidance, blaming). Other coping strategies instead reflected more passive behaviors of handling a perceived problem (inward escape, resignation). Importantly, coping strategies represent conscious (prioritizing) and unconscious selections of behaviors (inward escape). Individuals can exercise some control over behaviors and outcomes in their selection of coping strategies (Brown et al., 2005; Srivastava & Sager, 1999), but some form of control is also created through coping (Noon et al., 2013; Paulsen, 2014). This view also reflects a knowledge-based approach to coping, in which coping over time (moving down the learning curve;

Yelle, 1979) generates knowledge, but was not always used for solving perceived problems in this context.

My analysis also highlighted that coping strategies in the call center context can be evaluated based on how they influence performance. This understanding differs from research highlighting coping in terms of successfully handling a situation (Brown et al., 2005; Chiu et al., 2005). Since the coping strategies were also aimed at solving perceived problems (fight-based coping strategies), escaping solving them (flight-based coping strategies), and not solving them (forgo-based coping strategies), coping only partly reflects a goal-oriented behavior (partly following research by Latack et al., 1995). By highlighting and separating the various coping strategies used by the call center agents, these findings also meet a demand in psychological, management, and organizational behavior research to examine how various coping strategies actually function and operate (Brown et al., 2005; Devi, 2012; Noon et al., 2013; Paulsen, 2014; Svensson, 2012).

## 9.2 Interpersonal elements and implications for performance

This study also teases out the antecedents of coping in the call center context, which referred to the three interpersonal elements in this study. My research revealed that interpersonal elements (contextual, control-based, and cultural elements) influence performance through the mediation of call center agents' use of coping strategies.

### 9.2.1 Contextual elements

My study found that call center agents' perceptions of time (how they utilized and aimed to control time) had a significant impact on the use of coping strategies and performance. By acknowledging the link between time and coping, my study found that call center agents perceive time differently, which influenced the frequency and duration of the use of coping strategies. In turn, various perceptions of time influenced performance. This finding can be valuable to organizational behavior research that emphasizes time in relation to coping (Noon et al., 2013). These findings mainly contribute to cognitive call center research by

providing a less pessimistic view of time compared to the dominant view in prior research (Lin et al., 2009; Sawyerr & Srinivas, 2007).

My study also contributes to cognitive research by highlighting the critical role of skills. This study provides in-depth insights that acknowledge variance and heterogeneity between agents (regarding type of skills, knowledge levels, and experience of the work), and work tasks, which nuance the under-analyzed discussion of skills in prior call center research (Grugulis & Stoyanova, 2011). Given that the work design demanded agents compensate for both skill and performance levels of their colleagues, this study also contributes to cognitive studies by acknowledging the group-based perspective in the call center setting (Batt & Moynihan, 2002; Townsend, 2005).

Finally, my findings highlighted that work processes and behaviors in these call centers could not be completely formalized or regulated despite operating with a top-down structure with a high level of formalization and functional specialization. My study found that call center agents perceived a possibility to influence their everyday life by making decisions in relation to their work tasks (such as which coping strategies to use). This finding highlights that the performance-management system in these call centers could be used for various purposes, since it also enabled agents to learn the expectations in regards to performance and behaviors. This insight contributes to research on agents' informal power in the call center setting (Bohle et al., 2011; Deery et al., 2002) but also to agency theory, since both Eon CS (the principal) and the call center agents breached their contracts to one another, which allowed agents to exploit their degrees of freedom by primarily acting on their own interests.

### **9.2.2 Control-based elements**

My study also contributes by acknowledging the role of control-based elements for performance in the call center setting. For example, my research pointed at low levels of perceived coercive control. Given that agents used the company's information and communication technologies when carrying out their coping strategies, these findings broaden our understanding of info-normative control by acknowledging variations of individual perceptions of control. In addition, I found that although operating with performance metrics and targets was supported by managerial practices, extrinsic rewards were not enough of a

compensatory mechanism to motivate agents to perform well (which also triggered an agency problem, explained above). Based on these findings, my research questions current assumption in theory that rewards are a great source of motivation and commitment for call center agents (Holman et al., 2007; Rowe et al., 2011). This finding undermines the entire rationale for using a performance-management system for controlling and sometimes foreseeing performance in call centers, which is a system that has high costs for operating call centers but also only moderate revenue.

My study also questions current assumptions that operating with a large number of targets optimizes performance in the call center context (Hausknecht & Trevor, 2011; Sewell et al., 2011). This study revealed that lacking knowledge of how to perform in line with requirements spurred prioritizing between targets. My findings also highlight the critical role of alignment between the organizational performance-management system, the overall business strategy in call centers, and managerial goal priorities to succeed at making customers satisfied.

### **9.2.3 Cultural elements**

Other theoretical contributions of this study included the role of cultural elements for performance in the call center setting. This was particularly salient in the discourses of distraction and managerial maneuvers for shaping agents' attitudes to fit the performance demands of the company. My study found that coercive control in regard to shared values of company products prevailed in these two call centers. The study revealed that agents used their informal power to decide which sales products to offer or not offer customers when lacking knowledge of how to perform in line with requirements. The managerial emphasis was placed on making agents act as ambassadors for company products, rather than generating identification with organizational goals. This relates to cognitive research regarding coercive control in call centers (Deery & Kinnie, 2002; Fleming & Sturdy, 2011). Given that middle managers were also required to disregard their own perceptions to spur agents to reach sales targets at a group level, my study contributes by highlighting that perceptions regarding company products influence performance in the call center setting.

By drawing upon research by Fleming & Sturdy (2011), Mahesh & Kasturi (2006), Sawyerr et al. (2009), Tuten & Neidermeyer (2004), and

Witt (2002), this study also clarified the complex link between work climate and performance. My study found that the elements of extraversion, personalization, positive attitude, and job satisfaction influenced performance through coping strategies. This link has been addressed to be missing in prior cognitive call center studies (Sawyer et al., 2009; Tuten & Neidermeyer, 2004). Acknowledging the cultural function of the group for understanding the link to performance contributes with a group-based view of call centers from a cultural perspective, which has been overlooked.

### 9.3 Practical implications for managing customer relations in call centers

This research has several practical implications. First, this research emphasizes the importance of middle management in keeping track of how various coping strategies are used, given their direct impact on performance. This study suggests that instead of trying to manage the consequences of these coping strategies, middle managers should handle the underlying causes of the coping strategies. Middle managers must particularly acknowledge individual needs for learning and identifying training needs to facilitate agents' handling and solving perceived problems at work (Armistead et al., 2002). My findings showed that middle management was not doing enough to keep costs low while realizing actual service and sales benefits by managing customer relations through these call centers. This was especially evident regarding the coping strategies of resistance, inward escape, physical escape, prioritizing, and resignation.

Second, this study suggests that management should take a closer look at the functionality and alignment between incentives, evaluation systems, and performance-measurement systems (the amount, type, and use of targets) in these in-house operations, which I refer to as the performance-management system. This is important because performing in line with expectations generated from dysfunctional performance-management systems did not fully motivate agents, which resulted in increasing costs and moderate revenue. These internal challenges call for a change according to one of these suggestions:

- Suggestion A: Additional career paths must be considered, such as by introducing a more hierarchical organizational structure. The study showed that the flat organizational structure and blind faith in performance metrics did not provide management with appropriate tools to strategically manage performance. My study showed that striving to measure all activities at work was sometimes counterproductive, as it generated additional human costs and agency problems. This questions the strategy of using call centers as a cost-efficient way to manage customer relations. This study found that aiming for both low costs (by maximizing efficiency and productivity) and obtaining sales revenues, while realizing service benefits through support of the performance-management systems, instead resulted in satisficing performance levels at large human costs (such as sick leave, burnout, and replacements). Although certain metrics are required for measuring performance, these findings highlight that the performance-management system also must be aligned with the strategic goals of the call center operations to succeed with making customers satisfied and keeping low operation costs.
- Suggestion B: Keeping a flat organizational structure to keep costs low calls for a higher acceptance, and even a goal, to operate with a high rate of turnover (as suggested in Wallace et al., 2000). Management needs more radical, efficient tools for persuading overly experienced agents to leave their jobs to avoid internalizing the consequences of current dysfunctions. The dynamic energy market causes changes in expectations of the agents. To (only) realize service benefits (satisfying customers) is not enough for the company to successfully operate. Agents must also perform well within all tasks. In other words, the implications of staying too long in this type of organization must be handled. The drawbacks of managing customer relations through in-house operations were clearly evident in this study, which calls for reconsidering outsourcing customer operations.
- Suggestion C: Short-term improvements can also be achieved by radically raising the incentives for agents to perform well when the organization breaches their contracts. Given that both the type and level of incentives influenced agents' effort levels, particularly when adding sales into the organization, additional

costs for incentives might be legitimate until a performance peak is reached, but less so over time.

Third, practitioners must also keep track of how the two other interpersonal elements (contextual and cultural elements) influence the individual use of coping strategies. For example, this study suggests that management should gain awareness of the meaning of their company products from a worker perspective to align internal sales goals and external vision with workers' behaviors. Managers should also acknowledge the significance of variance and heterogeneity of skills, knowledge, and experience in each work group for performance, given their impact on the use of coping strategies. This study showed that understanding the links between interpersonal elements, coping, and performance is crucial for successfully facing internal and external challenges to gain economic benefits.

In sum, the findings in my study provide guidelines for managers to organize work for managing customer relations in call centers. Given that call center agents are exposed to strategic decisions at the organizational level (Armony & Gurvich, 2010), my findings provide important implications of how the role of middle managers can be optimally used for managing complexities in the call center setting. Based upon these findings, I suggest that Eon CS (and other call center organizations) should make more use of call center agents' knowledge to develop novel, more accurate metrics (and how they are measured) for establishing service quality in call centers. This would better reflect that they operate a customer service with a vision of delivering the *most liked customer experience*. Utilizing agents' detailed knowledge and experience of what actually happens in customer interactions could enhance management's understanding of the black box linking organizational practices to service performance (Batt & Moynihan, 2002; Dean & Rainnie, 2009; Dun et al., 2011; Jack et al, 2006). With these suggestions, Eon CS could better meet current and potential customers' demands on customer service in the dynamic, competitive, and evolving energy industry (Broberg et al., 2012; Lennebo, 2012). This could change the trend of customer satisfaction rates (SQIs) below industry average.

## 9.4 Comments about contribution and validity

Early in the research process, I developed insights from theory into a preliminary theoretical framework that guided the research process before and after the study of cases. The preliminary framework led me into certain directions in terms of which theoretical constructs that prior theory regarded as significant in terms of performance. Prior insights regarding the supposed elements influencing performance in this call center setting were analyzed through iteration between transcripts, notes, and empirical findings from the cases with the preliminary theoretical framework, enabled by triangulation. The longitudinal case design allowed for testing initial insights by recurring interviews and observations of the embedded cases (as described in Chapter 4). As coping behaviors increased in importance, in line with more focused interviews (interview set 2), a thorough examination of coping in call center literature revealed theoretical gaps. The findings in this study were compared to results and theoretical contributions from related theories and research. The integration of insights from general studies of performance drivers and the antecedents to coping, particularly the link between coping and performance, illuminated relevant links not established in prior theory.

For example, prior research mainly analyzed coping in relation to stress (Barnes, 2005; Goussinsky, 2012; Korczynski, 2003) by regarding it as a psychological resource for dealing with something perceived as negative (D’Cruz & Noronha, 2007; Perkins, 2013). In a thorough review of coping in related research, my findings instead found that coping as a learning process was influenced by experience (Baranik et al., 2014; Raz, 2007; Sczesny & Stahlberg, 2000; Tuten & Neidermeyer, 2004) and perceptions of dysfunctions. By comparing my findings to results in prior theory, the significance regarding the elements included in the three interpersonal elements of this study was also further established and refined. The suggested revised theoretical framework reflects how the theoretical constructs during the process of this study were kept consistent with prior theory.

The relevance of this research was illustrated in the previous section (coping as a mediator for performance, interpersonal elements, and implications for performance and practical implications). My findings regarding the particular links of contextual, control-based and cultural elements, and coping with performance are generalizable to research on



call centers similar to Eon CS (in-house front-office call center operations, handling a variety of inbound customer calls [and outbound calls to some extent] by agents with various employment conditions for a company in a dynamic industry). Given the emphasis on the worker perspective (subjectivity and individual behaviors), the framework presented in my study is also mainly applicable for Swedish and Scandinavian industries with similar labor laws and union impacts. The observation that individuals develop and adopt coping strategies influenced by their workplace context, prevailing control, performance-management systems and cultural aspects is presumably relevant within other organizations with work restrictions and complexities similar to call centers. These findings could be stretched to service-work environments using virtual teams (in which members use technology to interact with one another across location and organizational boundaries; see Gibson & Cohen, 2003). Given that both call center teams and virtual teams rely on technology-mediated communication (Lipnack & Stamps, 1999), my findings could serve as valuable input in discussions of how to improve effectiveness by aligning organizational structures to enhance customer relations management. An analytical generalization of middle managers' indirect impact on performance is most likely also relevant for virtual teams and for organizations using a similar work design and flat organizational structure as in these call centers. The explanatory power of the revised framework compared to existing call center literature is analytically and primarily valid for call center research. Given its emphasis on individual perceptions and the impact of work behaviors on various types and levels of output, this framework also applies within organizational behavior research (Noon et al. 2013). By drawing on my research regarding the essence and impact of coping behaviors, these findings could further increase our understanding of human behavior and actions, regarding individual and collective behaviors, and their implications at work.

## 9.5 Limitations and future research

These implications must be considered in the light of the limitations. The implications of this study are to some extent limited to businesses in similar industrial settings (as noted above). Consequently, future studies should test these links in businesses within other industrial settings to

enhance our understanding of the use and impact of coping behaviors on performance. For example, it would be particularly interesting to relate these findings to expert organizations, in which both differences and similarities between these two types of specialized organizations could be addressed. Using a comparative approach (multiple cases) by the guidance of a formal theory to develop my explorative findings might reveal differences between businesses. This may enable a more generic framework regarding the links between interpersonal elements, coping, and performance to call center businesses in general.

Given that the framework presented in this study depends on rather stable work conditions that might change over time, these findings should also be tested statistically among a larger number of respondents within a diverse set of call center settings to provide a more generic framework for call centers.

Further emphasizing an external perspective, such as by interviewing customers in relation to their interaction with a call center, future studies could develop my findings by examine how both private (B2C) and business customers (B2B) are affected by agents' adoption of coping strategies. An enlarged focus on an external perspective of call centers could provide further guidelines for call center businesses in how to succeed with aligning internal goals with company vision.

This study proposes that control-based, context-based, and cultural elements influence agents' adoption of coping strategies that determine individual- and group-based performance in call centers. Agents' learning curve and, more specifically, the absence of appropriate knowledge levels and types of how to effectively solve a perceived problem, were identified as the central elements for the adoption of these coping strategies. Future studies should further these findings by instead focusing on the managerial perspective in relation to coping. For example, future work could examine if, how, and why middle managers utilize coping strategies when managing agents and customer relations in call centers. Furthering the managerial perspective of coping would allow for examining potential differences in agents' and managers' coping strategies in call centers.



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# Appendix 1: Background information of the four subcases

Table 19: Background information in the four subcases, between 2011–2014, Eon CS

Metric/ Case	Case Beta, Sollefteå (SWE)				Case Gamma, Sollefteå (SWE)				Case Delta, Sollefteå (SWE)				Case Epsilon, Norrköping (SWE)			
	2011	2012	2013	2014	2011	2012	2013	2014	2011	2012	2013	2014	2011	2012	2013	2014
Average agent age	38	33.7	36.6	35.5	38.9	36.8	38.2	37.4	27.8	27	27.9	25.4	33.4	36.2	35.6	35.2
Number of middle managers at EON	2.8	2.3	3.3	2.4	3.2	5.8	3.8	2.6	2.2	1.6	1.7	1.4	2.6	3.6	3.3	3.4
Length in the company (years)	5.1	4.7	4.2	6.2	5.3	7	5.6	6.4	1.6	1.8	2.4	2.1	3.9	7.4	7.0	7.4
Length in the case (years)	3.56	3.2	4.2	4	2.3	2.6	3	3.7	0.3	0.8	1.4	2	2.4	1.1	1.6	2.6
Rate of employed agents	100%	81.2%	83.3%	100%	100%	94.7%	81.3%	100%	9.1%	45%	46.7%	70%	96%	100%	84.2%	100%
FTE	87.5%	75%	88.2%	94.7%	81.8%	68.4%	70.6%	56.3%	100%	94.1%	100%	100%	96%	69.2%	73.7%	73.7%

# Appendix 2A: Interview Guide 1

**Table 20: Interview Guide 1 and operationalization of theoretical concepts (Eon Customer Service, March/April 2012)**

Interview questions		Operationalization of:	Comment
<i>Basic background questions</i>	Name, Age, Educational level, Tenure in the company, Number of managers, Work title	<i>Age, Formal education, Tenure, Temporary agents</i>	Questions for basic understanding of the respondents
<i>Work-related questions</i>	1. Describe your work. Routine/ non-routine?	<i>The structure of the work organization</i>	Questions for capturing work activities, type of work, and view of routines
	2. Similar tasks each day? Repetitive? Monotonous/non-monotonous?		
	3. Clear descriptions and routines of how to carry out your work?	<i>Role conflict/Role ambiguity</i>	
	4. Routines are followed? Updated? Strict?	<i>Work design and power IT-systems</i>	
<i>Learning and skill-based questions</i>	1. How do you define a competence and a skill in you work? How does Eon utilize skills?	<i>Initial training Skills and level of knowledge</i>	Basic questions of types of skills utilized at work
	2. What types of skills and knowledge is required to carry out your job? Changes in skills over time?		Questions for capturing views on learning, knowledge, and of how learning is practically carried out in the case company
	3. Time requirement for learning the skills and knowledge required?		
	4. Exploiting your skills fully? Why/ why not? Are your skills valued?	<i>Well-being</i> in regards to knowledge	Questions for capturing views of surrounding elements important for understanding views of learning and skills
	5. In need of more training and education to carry out your work?	<i>IT-systems Training</i>	
	6. Satisfied with opportunities for exploiting skills? Why/why not?	<i>Job satisfaction</i>	
	7. Manager encourages learning new? How? Why/why not?	<i>Managerial support Managerial feedback</i>	Questions for capturing views of how performance and control-based elements are perceived and acted upon.
	8. Issues affecting willingness to learn: Broadly and/or deeply?	<i>Skills and level of knowledge</i>	
	9. How do you learn? Is knowledge shared in the group? How?	<i>Teams</i>	
<i>Questions of performance and control</i>	1. Performance /non-performance based work? Why/why not?	<i>Goal orientation Managerial elements</i>	Questions for capturing views of how performance and control-based elements are perceived and acted upon.
	2. Perceived level of surveillance? Level of control?	<i>Work design and power</i>	
	3. Reaching all your targets? Why/why not?	<i>Reaching targets Goal orientation Role conflict/Role ambiguity</i>	
	4. How are targets set? Personal influence? How do you like competitions? Why?	<i>Work design and power</i>	
<i>Questions of work environment</i>	1. Relation to colleagues? At the facility and to other sites? In the work group?	<i>Teams: finding out inter- and intragroup relations</i>	Questions for capturing view of the work environment

<i>and motivation</i>	2. Motivation to carry out your work? Dependent upon? Managerial influence?	<i>Extrinsic motivation Commitment Goal orientation Job satisfaction Managerial feedback</i>	and motivation
	3. Perceived level of stress at work? Stress-related issues? Describe.	<i>Employee stress Handling time</i>	

## Appendix 2B: Interview Guide 2

**Table 21: Interview Guide 2 and operationalization of theoretical concepts (Eon Customer Service, Nov 2014)**

Interview questions	Operationalization of:	Comment	
<p><i>Questions related to coping and performance</i></p>	<p>1. Describe your day at work. Stressful? When? Give examples.</p>	<p><i>The structure of the work organization</i> <i>Employee stress</i></p>	
	<p>2. Do targets have an impact on your perceived stress-levels? Why/ why not? How?</p>		
	<p>3. Do you perceive having control over your work? And time at work? Why/why not? How do you act upon that? How do you use your time?</p>	<p><i>Coping</i> <i>Handling time</i> <i>Goal orientation</i> <i>Work design and power</i></p>	
	<p>3. Aware of targets? Of performance levels? Can you always carry out all parts of the work? Enough time? Why/why not? How do you act if not reaching targets? Do you/how do you prioritize then? Why?</p>	<p><i>Employee stress</i> <i>Coping</i> <i>Well-being</i></p>	
	<p>4. How do you handle stress? Are there explicit strategies against stress? How do these ways develop? Equally handled in the work group or individual strategies?</p>		
	<p>5. How are breaks and pauses used? What do you do? Why?</p>	<p><i>Handling time</i> <i>Coping</i></p>	
	<p>6. Opportunities to take pause during work hours? How? When? How often? Behaviors during these pauses? By yourself or with others?</p>	<p><i>Managerial support and feedback</i> <i>Control</i> <i>Coping</i></p>	
	<p>7. Do breaks affect you performance? How/why/why not?</p>		
<p><i>Questions related to the performance categories</i></p>	<p>1. I found that performance and work tasks at Eon CS could be divided into these three performance categories (A, B and C). Are they valid? Why/why not? Describe.</p>	<p>(open question)</p>	
	<p>2. Do you think an agent can perform in each of these categories? Why/why not? Can they be related to one another? How? Explain.</p>	<p><i>Role conflict/ Role ambiguity</i> <i>The structure of the work organization</i></p>	
	<p><i>Questions related to performance category A</i></p>	<p>1. What do you think is required in order to be efficient?</p>	<p>(open question)</p>
		<p>2. Do the existence of targets has impact on you efficiency? How/Why?</p>	<p><i>The structure of the work organization</i> <i>Reaching targets</i></p>
<p>3. Do you think tenure or/and experience influence efficiency? Why/why not? How? Give examples.</p>	<p><i>Tenure</i> <i>Temporary agents</i> <i>Age</i></p>	<p>Questions for understanding their views of elements related to routine-based efficiency, targets and metrics (and how they are measured), by testing initial empirical findings</p>	
<p>4. Does the group climate influence your efficiency? How? Why/why not? Is/how is fun impacting upon individual efficiency? In what ways? How does your manager act upon it?</p>	<p><i>Teams</i> <i>Attitudes</i> <i>Control</i></p>		

	5. Is/How is knowledge shared in the work group? How are problems solved? Does diversity influence and how? Impact on efficiency: individual and group?	<i>Skills and level of knowledge</i> <i>Teams</i> <i>Coping</i> <i>Role conflict/Role ambiguity</i>	Questions for capturing group dynamics
	6. Are you satisfied with monetary gains? Does salary/bonus influence your efficiency? How/why/why not?	<i>Extrinsic motivation</i> <i>Job satisfaction</i>	Testing initial empirical findings
<i>Questions related to performance category B</i>	1. What do you think is required to fully satisfy customers? Specific agents better at satisfying customers? Who and why?	(open question) <i>Personalization</i>	Questions for understanding their view of elements related to performance of social efficiency, by testing initial empirical findings
	2. What is required to succeed with sales overall? Specific agents that are better at sales? Who and why?	(open question)	
	3. Can an employee satisfy customers fully while sell well? Compatible objectives? Why/ why not? How do you handle this?	<i>Role conflict/Role ambiguity</i> <i>Coping</i> <i>Reaching targets</i>	
	4. Do you need to balance efficiency and customer satisfaction? How do you do that? Give examples. What tools do you use?	<i>Handling time</i> <i>Coping</i>	
	5. What do you think about competitions? Do competitions spur you to perform well? Why/why not? How? Describe.	<i>Goal orientation</i> <i>Commitment</i>	
<i>Questions related to performance category C</i>	1. What do you think is required to perform well regarding e-mails? And for administrative errands?	(open question)	Questions for understanding their views of elements related to problem-solving efficiency, targets and metrics (and how they are measured), by testing initial empirical findings
	2. What is required to solve problems? And solving problems fast? Specific agents better at solving problems? Who and why? Do problem-solving influence your performance in other ways? How do you handle that?	(open question) <i>Role conflict/Role ambiguity</i> <i>Coping</i>	
	3. How do you learn how to solve problems? Individually? In the work group? Describe.	<i>Teams</i> <i>Skills and level of knowledge</i>	Questions for capturing group dynamics



## Appendix 3: Performance metrics

Table 22: Performance metrics and guidelines for evaluation

<p><b>Talk time</b></p>	<p><b>Description:</b> This performance metric reflects the part of the customer errand where the agent is talking to the customer on phone.  <b>Measured and evaluated:</b> In minutes and seconds (Controller at Eon CS, September 2012). The agents talk to customers as long as they consider necessary in order to make customers satisfied, but should be as efficient as possible (according to evaluations). The appropriate time for talking was not explicitly defined. Agents estimate an appropriate talk time according to how fast they can include and execute mandatory elements (Division manager, August 2013).  <b>Target:</b> There are no "hard" general targets for this performance metric. Agents' actual talk time is downplayed when evaluating their performance.</p>
<p><b>Wrap-up time</b></p>	<p><b>Description:</b> The wrap-up time<sup>81</sup> reflects the part of the errand where agents wrap up (complete) the call. Here agents make brief notes in the IT system of what the customer was asking, whether an agreement was carried out, and if customers' issues were solved. Agents also change customer data in IT systems and write notes to agents with administrative duties to perform activities in order to complete the customer errand (Controller at Eon CS, September 2012).  <b>Measured and evaluated:</b> In minutes and seconds, should be as short as possible.  <b>Target:</b> No target in 2011, but enlarged focus on efficiency generated an "aimed" target (not considered to be a hard target) of 5:00 minutes per call in 2012–2013. No target for 2014 (Division manager, November 2012; August 2013).</p>
<p><b>Total errand-time on phone</b></p>	<p><b>Description:</b> This performance metric reflects a summary of the talk time and wrap-up time for handling an errand (Controller at Eon CS, September 2012).  <b>Measured and evaluated:</b> In minutes and seconds. The main objective is to ensure that the wrap-up time constitutes the smallest part possible of the total errand-time.  <b>Target:</b> 8:40 minutes (first half) and 8 minutes (second half) in 2011, 8:30 minutes in 2012–2014. The target for this metric slightly varied from year to year, and was set as a combination of requirements from the headquarter in Germany, average total errand-time for all agents in the case organization during previous year, and in relation to the average performance of the individual (CFO at Eon CS, April 2015).</p>
<p><b>Telephone efficiency</b></p>	<p><b>Description:</b> This performance metric aims at measuring agents' efficiency on phone, which is not explicitly made visible for the agents at Eon CS, but is used as a guideline for middle managers in performance evaluations.  <b>Measured and evaluated:</b> Errands (on phone) /scheduled time on phone  <b>Target:</b> No specific target but should be as high rate per scheduled hour as possible.</p>
<p><b>Customer Satisfaction</b> (Satisfied Customer Index)</p>	<p><b>Description:</b> This performance metric aims at measuring how satisfied customers are with the overall interaction and treatment by the individual agent.  <b>Measured and evaluated:</b> Randomized chosen customers (selected by the IT system) are asked to stay on phone after talking to an agent to rate their satisfaction of the interaction. These ratings are summarized monthly and yearly on an individual and group level. This metric measures the individual call center agent's performance in the customer satisfaction rather than the overall performance in the organization (compared to NPS, see below) (Controller at Eon CS, September 2012). This performance data are only supposed to be advising and used as guidelines in middle managers' evaluations of agents (Division manager, April 2012). Organizational performance is reported to the company group's headquarter (CFO at Eon CS, April 2015).  <b>Target:</b> As high as possible, target set at 5.3 for 2012–2014 in a scale from 4.7 to 6.0.</p>
<p><b>Sales</b></p>	<p><b>Description:</b> This performance metric aims to measure agents' abilities to sell products/ agreements during incoming customer calls. Sales agreements (also referred to as <i>additional services</i>) consist of insurance and security alarm offerings and technical equipment (such as 100 check, which measures customers' energy consumption, introduced in February 2014). Eon CS has been commissioned by Eon</p>

<sup>81</sup> Wrap-up time is in articles and call center reports generally referred to *after call work time* and *follow-up time* (Anton & Belfiore, 2012).

	<p>Sales to sell these products where the profit goes to Eon Sales. Eon CS is in turn charging for the services they have performed for Eon Sales (Division manager, January 2014). Agreements of providing customers with electricity produced by wind power and hydropower are also included in this performance metric. There were in total 4 sales products at Eon CS.</p> <p><b>Measured and evaluated:</b> Change of measurement in line with larger emphasis upon sales at Eon CS. Measured by rate of sold agreements per scheduled hour in green time (2011), which was refined to be measured by sold agreements per incoming call (2012–2014), emphasized to better represent agents' actual sales productivity (Controller at Eon CS, September 2012).</p> <p><b>Target:</b> As high as possible, but set target at 17% sold agreements per answered incoming call (2012–2014) at the organizational level, which is a percentage that reflects 25,000 agreements for energy produced by wind power to private customers, 2,400 environmental-friendly agreements to SME's, and 50,000 agreements for Eon's technical equipment for measuring energy consumption in 2014.</p>
<p><b>E-mail efficiency</b></p>	<p><b>Description:</b> This performance metric measures the time spent responding to and completing a customer errand by e-mail and web-based chat, with additional administrative duties to solve the customer problem fully. The metric was implemented in the organization in the beginning of 2012 (Controller at Eon CS, September 2012).</p> <p><b>Measured and evaluated:</b> In minutes and seconds. This metric has been described to be misleading, since agents, to some extent, can choose to execute easy and faster e-mail errands (Division manager, August 2013). To perform especially well in this metric was not of the highest priority in the organization.</p> <p><b>Target:</b> General targets are set between 7 to 11 minutes, depending on the type of task executed. For regular energy enquiries, the target was 7:55 minutes (2012–2013), and 8:15 minutes (2014).</p>
<p><b>Administrative efficiency</b></p>	<p><b>Description:</b> Time spent/efficiency at solving administrative errands (Controller at Eon CS, September 2012). During this scheduled time, agents navigate in the IT systems and perform administrative actions needed for carrying out changes. For example, when customers ask for signing a new agreement, to change or terminate electricity agreement, and change of address, administrative actions need to be performed by the agents.</p> <p><b>Measured and evaluated:</b> Number of solved administrative errands/ hour of scheduled administration (rate of administrative errands). Developed to actual errand-time (2014), in minutes and seconds. This metric is regarded as "a subjectively based metric on individual assignments, and that is only attached with a <i>theoretical</i> errand-time" (Division manager, November 2012). Refined measurement from May 2013 to better reflect performance of the administrative work, which enabled new and improved calculations of the metric (Division manager, January 2014).</p> <p><b>Target:</b> No productivity-based targets, only for the average time spent on these errands. The target was set at 10:30–24 minutes, depending on type of task executed. For regular energy-based admin. inquiries, target was set at 10:30 minutes (2012–2013), and 7:45 minutes (2014).</p>
<p><b>NPS (Net Promoter Score)</b></p>	<p><b>Description:</b> This performance metric is at Eon CS used to compare customer loyalty between firms, mainly utilized toward other energy producers.</p> <p><b>Measured and evaluated:</b> Both measured as top-down and bottom-up process. The <i>top-down process</i> is carried out by randomly selecting customers (regardless of when the last contact with Eon CS was carried out) to ask them: "On a scale from 0 to 10, how likely is it that you would recommend Eon to a friend or colleague?", whereas 0 represents "extremely unlikely" and 10 represents "extremely likely". The <i>bottom-up process</i> is carried out similarly but solely include "active" customers (customer that have interacted with Eon CS recently). Approximately 1.000 NPS-calls are made every three months, excluding additional telephone interviews. Questions asked during these interviews include how customers perceive the service attitude of the call center agent the interaction was carried out with, perceptions of his/her level of knowledge and skills, pedagogical skills, and other feedback questions. Both processes are then summarized into a total score (percentage of promoters [scale points 9 to 10] minus percentage of detractors [scale points 0 to 6]). The NPS is aimed at representing the overall customer perception of the company (Middle managers, Division manager, November 2012).</p> <p><b>Target:</b> No specific targets.</p>

<p><b>Right Mental Attitude (RMA)</b></p>	<p><b>Description:</b> This metric does not reflect an explicit performance metric (as the ones presented above), but aims at measuring agents' behaviors (soft, subjective performance metric).</p> <p><b>Measured and evaluated:</b> This metric was implemented at Eon CS's performance-evaluation system early 2013 (Middle managers, Division manager, November 2012), which originates from top management's strategy of using "the lessons from sports to create winning performances", which is manifested through certain guidelines. Examples are: <i>The 3 W's (We Want to Win)</i>, <i>The interest for winnings is celebrated</i>, <i>More challenging = more fun</i>, <i>The whole is greater than the parts</i>, <i>Strategy and tactics concerns everyone</i>, <i>Pride 3P's (Proud People Perform)</i>, <i>[It's] OK to make mistakes</i>, <i>Internal pep talk</i>, <i>Attitude to working hours and TLE (The Little Extra)</i>, <i>Feedback improves</i>, and <i>The 3 T's (Train the Team Together)</i>. These guidelines aim to develop a "high performance culture", influenced by the performance-attitude and included in the evaluation tool, subjectively evaluated by middle managers. A summarized evaluation of these guidelines (soft metrics) also serves as a basis for the assessment of agents in performance appraisals (Division manager, November 2012).</p> <p><b>Target:</b> No specific target but instead included in the evaluation tool.</p>
<p><b>Absence due to illness</b></p>	<p><b>Description:</b> This metric aims to measure the psychosocial status of the work group and individual agents. Previous to the year of 2011, this metric was not measured since the top management didn't consider the absence to be an important factor for the organization's overall performance, but as a result of constantly increasing rates of absence in both call centers, this metric was implemented at Eon CS in the end of 2011 (Division manager, April 2012).</p> <p><b>Target:</b> A general target at Eon CS was set at a maximum rate of 5% absence due to illness per work group.</p>

## Appendix 4: Performance data: Organizational level

Table 23: Organizational performance data at Eon CS

Performance metric/ Year	2011	2012	2013	2014
<b>Talk time</b>	3:49 minutes	3:49 minutes	3:46 minutes	3:42 minutes
<b>Wrap-up time</b>	6:12 minutes	6:03 minutes	5:43 minutes	5:20 minutes
<b>Total errand-time on phone</b>	10:01 minutes	9:54 minutes	9:29 minutes	9:02 minutes
<b>Telephone efficiency</b>	4.61 errands	5.94 errands	5.67 errands	6.87 errands
<b>Satisfied Customer Index</b>	Rate of 5.26	Rate of 5.34	Rate of 5.39	Rate of 5.49
<b>Sales productivity</b>	1.0*	17.10%	16.95%	22.34%
<b>E-mail efficiency</b>	Not measured	11:12 minutes	10:31 minutes	8:45 minutes
<b>Administrative efficiency</b>	7.15 errands	7.47 errands	3.04 errands	8:07 minutes**

\* The metric aimed to capture sales performance was refined during the time of my study to better represent agents' sales productivity (refined between 2011 and 2012).

\*\* Eon CS chose in 2014 to measure the average time spent at solving administrative errands rather than evaluating it from an efficiency-based approach (as prior to 2014).

## Appendix 5: Examples of group level performance data

Table 24: Group-based performance data and targets for the four subcases, examples in 2012 and 2014

Metric/ Case	Case Beta				Case Gamma		Case Delta		Case Epsilon	
	Target 2012	2012	Target 2014	2014	2012	2014	2012	2014	2012	2014
Satisfied Customer Index, NKI	5.3	5.35	5.3	5.48	5.37	5.48	5.41	5.51	5.28	5.45
Errand-time: Talk time	-	4:03	-	3:42	3:51	3:26	3:58	3:48	3:59	4:03
Errand-time: Wrap-up time	5:00	5:14	-	5:10	6:46	5:37	5:18	3:45	6:32	6:00
Errand-time: Total telephone Errands (on phone)/ scheduled time on phone	8:30	9:17	8:30	8:52	10:37	9:03	9:16	7:33	10:31	10:03
Errand-time: E-mail	7:55	9:05	8:15	7:32	10:55	9:32	9:42	5:44	14:00	11:09
Sales	17%	17.9%	17%	21.6%	20.3%	22.5%	22.7%	32.1%	17.6%	20.1%
Absence due to illness	5%	4.48%	5%	16.9%	5.02%	12.8%	6.02%	9.9%	4.75%	8.1%

# Appendix 6A: Examples of individual performance

Table 25: Summary of internal performance trends in the four subcases<sup>82</sup>

Performance category/Trend		Homogeneous	Heterogeneous	Volatility
(A) Routine-based efficiency	Telephone efficiency	Case Gamma Case Epsilon (smallest diff)	Case Beta	Case Delta (largest diff)
	Customer satisfaction	Case Delta (smallest diff) Case Epsilon (largest diff)		Case Beta Case Gamma
(B) Social efficiency	Sales	Case Beta (largest diff)	Case Delta (smallest diff)	Case Gamma Case Epsilon
	Administrative efficiency	Case Gamma Case Epsilon		Case Beta (largest diff) Case Delta (smallest diff)
(C) Problem-solving efficiency	E-mail efficiency	Case Beta (largest diff) Case Delta (smallest diff) Case Gamma		Case Epsilon

<sup>82</sup> “Smallest diff” stands for *smallest* internal performance differences over time (within the subcase), whereas “largest diff” stands for *largest* internal performance differences over time in relation to the four selected subcases.

## Appendix 6B: Examples of individual performance variation

**Table 26: Individual performance differences of performance metrics over time: Case Beta**

Case /KPI per low performer/high performer: <i>Beta</i>	2011		2012		2013		2014	
	Low*	High**	Low	High	Low	High	Low	High
Wrap-up time	9:31	2:47	8:31	1:42	10:22	2:01	7:57	2:44
Total errand-time	14:36	5:54	13:33	5:50	14:51	6:08	10:56	6:16
Errands per green time	3.13	8.21	3.58	9.42	1.78	9.53	2.69	11.58
Talk time	5:16	2:33	5:36	2:32	2:31	6:07	6:37	2:24
Customer Satisfaction Index	4.69	6	4.89	6	4.5	6	4.51	5.86
Sales	0.31	2.23	10%	39.1%	10.7%	42.4%	8.9%	29.4%
E-mail efficiency	(not measured)		26:29	2:32	16:07	1:58	13:21	3:02
Administrative efficiency	0	10.2	1.58	30.1	0	9.64	10:52	1:24

**Table 27: Individual performance differences of performance metrics over time: Case Delta**

Case /KPI per low performer/high performer: <i>Delta</i>	2011		2012		2013		2014	
	Low*	High**	Low	High	Low	High	Low	High
Wrap-up time	9:22	3:13	9:03	2:53	8:02	2:19	6:14	1:31
Total errand-time	13:59	6:05	13:07	6:26	11:31	5:44	10:10	5:18
Errands per green time	3.85	7.45	1.19	20.5	3.57	11.21	6.96	16.46
Talk time	5:26	2:43	5:24	2:30	5:28	2:01	5:16	3:40
Customer Satisfaction Index	4.72	5.79	4.8	6	5.1	5.82	5.03	5.75
Sales	0.65	2.17	12.3%	30.3%	12.5%	32.1%	19.7%	45.6%
E-mail efficiency	(not measured)		17:33	3:27	17:36	4:03	9:17	1:29
Administrative efficiency	1.43	9.77	0.96	12.24	0	8.97	9:38	1:28

\* Low = low performers according to company guidelines

\*\* High= High performers according to company guidelines

**Table 28: Individual performance differences of performance metrics over time: Case Gamma**

Case /KPI per low performer/high performer: <i>Gamma</i>	2011		2012		2013		2014	
	Low*	High**	Low	High	Low	High	Low	High
Wrap-up time	9:31	2:47	13:38	3:27	10:23	3:36	9:58	2:26
Total errand-time	14:36	5:54	16:47	6:44	13:25	6:55	13:22	6:20
Errands per green time	0.69	10.4	0.10	7.8	3.64	9.95	3.99	10.17
Talk time	7:10	2:31	5:04	2:47	5:20	2:48	4:36	2:36
Customer Satisfaction Index	4.5	5.7	4.7	5.69	4.57	5.94	5.16	5.96
Sales	0	2.09	9%	33.3%	13.2%	40.3%	13.7%	34.7%
E-mail efficiency	(not measured)		22:15	4:47	17:31	3:43	16:14	2:53
Administrative efficiency	0	16	0.84	8.12	0	7.2	17:13	3:02

**Table 29: Individual performance differences of performance metrics over time: Case Epsilon**

Case /KPI per low performer/high performer: <i>Epsilon</i>	2011		2012		2013		2014	
	Low*	High**	Low	High	Low	High	Low	High
Wrap-up time	9:13	1:40	12:17	3:06	8:16	3:19	9:22	1:37
Total errand-time	13:23	4:37	15:01	6:12	13:27	6:34	14:49	5:08
Errands per green time	2.22	8.98	1.85	7.85	3.55	8.43	2.9	7.56
Talk time	6:07	2:21	6:37	2:01	6:37	2:40	6:56	2:46
Customer Satisfaction Index	2.75	6	4.44	5.7	4.98	5.77	4.98	5.74
Sales	0	4.53	3.7%	33.4%	12.8%	23.1%	3.7%	30.1%
E-mail efficiency	(not measured)		16:26	4:55	21:48	5:47	17:50	6:02
Administrative efficiency	0	18.38	0.13	16.3	0	6.47	22:11	1:32

\* Low = low performers according to company guidelines

\*\* High= High performers according to company guidelines





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