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**“Kia ora and welcome to Immigration New Zealand.”**

**The experience of calling and working for the  
Immigration New Zealand Contact Centre.**

A thesis presented in partial fulfilment of the requirements for the

degree of

Master of Arts

in

Psychology

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New Zealand.

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## Abstract

Call centres are employed to provide an increasingly complex array of government services; however, the experiences of staff and customers remain under-researched. This study investigated the complementary experiences and expectations of employees and customers of the Immigration New Zealand contact centre.

Ten customer service officers in the Immigration Contact Centre and eleven immigrant representatives were engaged in semi-structured interviews. The call centre employees also kept work diaries for one week and were observed working. The data were analysed using thematic analysis. Six themes from the callers' data and six themes from the customer service officers' data were identified and compared.

The findings suggest that the call centre model of work organisation frequently creates difficulties for both staff and 'expert' users. Problems arise from the competing requirements of providing accurate information and processing calls rapidly. The study also shows that the complex legislative and policy framework governing immigration sometimes creates situations where it is difficult for call centre staff to provide definitive advice. This can strain the relationship between staff and callers and create problems for both parties. Expert callers' attempts to deal with the underlying organisational issues of complex policy and inconsistencies in the immigration system appeared to exacerbate the problems for the contact centre staff.

The experiences of immigrant representatives and customer service officers are similar in many respects. Both the contact centre employees and the immigration representatives shared the function of 'gatekeepers' and enablers and the requirement for emotional labour in their interactions with their mutual clients.

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## **Chapter One: Introduction**

This research aimed to explore the complementary expectations and experiences of service users and call centre staff at the Immigration New Zealand Contact Centre (ICC). The aim was to examine whether the organisation of the work within the call centre created problems for service users and call centre staff, and to explore the ways in which this affects the experiences of users and employees of this organisation.

### **1.2 Background to the study.**

As an organisational design the call centre model has attracted a great deal of attention from academic researchers over the last 20 years and has become familiar to many people across the world through their personal experience of working in or receiving services from call centres. Call centres originated in the commercial sector, having been created primarily with the aim of reducing costs by centralising services (e.g., Hauptfleisch & Uys, 2006; Martí-Audí, Valverde, & Heraty, 2013; Russell, 2008; Taylor & Bain, 1999, 2005).

With services becoming a major generator of revenue in many capitalist economies including New Zealand there has been a great deal of effort invested in reaching, attracting and keeping customers. This has included customizing services where this will produce financial benefit, yet also standardizing customer interaction to reduce costs (Batt, 2000; Batt & Moynihan, 2002; Korczynski, 2002).

This century the call centre model has migrated to public and professional services. Many New Zealand government departments and local councils use call centres and these call centres are also some of the larger New Zealand call centres (Hunt, 2004b). The job content within these centres can be very different from that found in call centres engaged in routine commercial activities. In public service centres job content encompasses providing information and services connected with the remits of the government departments they represent. These include taxation,

transport, immigration, employment relations, as well as health and social welfare. The services can range from simple, such as providing transport timetable information to complex, such as legal advice. Given that public services are sites where government policy and individual aspirations intersect but do not always agree, call centre agents working in these centres may sometimes need to deliver information and services which disappoint their callers, many of whom may bring their expectations about the nature and outcome of the interaction formed by their experience with commercial call centres. In commercial service interactions customers are usually encouraged to believe their needs are paramount. Korczynski (2003) called this “the enchanting myth of their [the customers] own sovereignty” (p. 57). He proposed customers might react angrily should the myth of sovereignty be exposed, when individual demands clash with, and have to bend to, production imperatives. In public service call centres, customers will not only encounter the routinisation and standardisation which characterise call centre interactions, but also the limitations of law and government policy. Some callers to public service centres will differ from those using commercial operations in that more people may elect to use advocates to represent their interests. Russell (2009) observed that both callers and call centre agents developed strategies to manage these tensions.

Research indicates that the drive for cost containment, throughput, measurable outcomes and consistent service, which is found in commercial call centres, is also found in public service call centres (Bain, Taylor, & Dutton, 2005; Houlihan, 2002; van den Broek, 2003). Many professional and/or public sector centre workers deliver complex, individualised services, sometimes according to occupational codes of practice resulting in lengthy calls, within an organisational model that was designed for cost efficient, speedy, consistent, prescribed and relatively simple transactions (van den Broek, 2004). One aim of this study was to consider how public sector customer service representatives manage the competing demands of dealing with complex individual circumstances and delivering standardized services.

### **1.2.1 Immigration.**

Migrants contribute an estimated \$1.9 billion per year to New Zealand's economy (Ministry of Business, Innovation and Employment (MBIE), 2014b). New Zealand competes for quality migrants with the United States of America (USA), Canada, United Kingdom (UK), and Australia according to Martin, Jenkins, & Associates Limited (2014) in their Review of the Regulation of Immigration Advice. Immigration is at the heart of our international education sector and growing tourism industry. Government encourages overseas investment in New Zealand, some of which requires investors to apply for a resident visa (Overseas Investment Office, 2014). Government creates and fosters international links that include special immigration provisions that reflect trade agreements, and New Zealand employers often need to recruit labour and skills from overseas. Immigration is valuable for our cultural and social well-being and as a nation we also have international refugee resettlement obligations (MBIE, 2015a). As a means to reunite and thereby strengthen families, immigration is important to many of our population with more than one million of New Zealanders having been born offshore (Mitchell, 2014). Immigration is also where the rights of the State to control its borders and the Executive to further the national interest through immigration policy, can conflict with the aspirations and rights of individuals who wish to enter or remain in New Zealand.

### **1.2.2 Immigration New Zealand.**

Immigration New Zealand (INZ) is part of MBIE. INZ is the official government body for deciding visa applications and is responsible "for bringing the best people to New Zealand to enhance social and economic outcomes" (MBIE, 2015a). The Immigration New Zealand Contact Centres (ICC) in Auckland and Palmerston North are often the sites for the first personal contact a potential migrant has with New Zealand bureaucracy. Advertisements for Immigration Contact Centre customer service officers note that these employees are "the 'voice' of Immigration New Zealand" (MBIE, 2014c). It is to the ICC that people seeking information are directed if they want

to speak with an official before and after a visa application has been accepted. It is likely that the initial impressions formed by these encounters will influence decisions to migrate.

### **1.2.3 Tensions and problems in the Immigration Contact Centre's remit.**

Immigration New Zealand has a market focus competing with other countries to attract the best people to New Zealand and this informs the ICC's customer service officer's (CSOs) role. As Batt (2002) noted "customer-contact employees manage the boundary between the firm and its customers... and the behaviour of these employees shape customers' buying behaviour" (p. 588). The relationship between INZ and potential immigrants is however, significantly different from the relationship between commercial businesses and potential customers. An immigration applicant can be either someone New Zealand needs or an applicant New Zealand does not want. In the ICC employees not only 'serve' the immediate client caller. As part of a public sector organisation, the ICC is accountable to political leaders, parliament, the public, and the judicial system (Phang, 2006; State Services Commissioner, 2007). While these multiple accountabilities may increase the pressure on the ICC to show efficiency and effectiveness in service delivery, they also produce a diverse, sometimes conflicted focus for customer service. On the one hand, the ICC's CSOs are expected to identify people New Zealand wants and provide information and advice to those who wish to visit, study, work or live here. On the other hand, these officers have to apply rules and regulations designed to protect the interests of their New Zealand stakeholders. They have to recognise people New Zealand does not want and let them know it. They are required to ensure temporary visa holders and potential migrants receive accurate information about law and policy criteria.

The difficulties call centre agents normally confront are compounded as the public sector, with its own characteristics, embraces this type of organisation as a mechanism for service delivery. In public service call centres the pressure on employees charged with meeting the competing drives of cost-efficiency and customer orientation in commercial centres is intensified by the requirement

to provide high quality, accurate information in a way the caller comprehends (Union Research Centre for Organisation and Technology, 2000; Burgess, Connell & Hannif, 2005; Russell, 2009). Accuracy in public sector work is important given the significant effects of incorrect decisions on individuals and the wide scrutiny decisions are subject to by stakeholders together with the potential for many decisions to be reviewed or appealed (Dillon, Buchanan & Corner, 2010).

CSOs receive calls from both applicants and from their New Zealand contacts. If applications are not accepted or declined or further information is sought by INZ the CSOs are often the first people to be asked for an explanation for the decision and advice about the next step. CSOs are likely to encounter callers' anxieties, despair, and anger daily. Callers expect the "advice and assistance" (MBIE, 2012b) for which they are directed to the ICC yet the information will not always be what they want to hear. The immigration experience can be fraught, particularly if the emotional and financial investment of potential migrants and their Kiwi contacts does not produce the desired returns. Callers therefore bring a wide range of pressures to bear on their interactions with the CSOs. A caller could be a New Zealand employer desperate for the migrant they have managed to recruit to be issued a work visa, a New Zealand education provider trying to secure student visas, or someone seeking protection as a refugee or attempting to regularise their immigration status or negotiate their voluntary departure rather than be deported. The ICC's CSOs are required to provide callers with information that may indicate they may not be able to realise their aims. There is a fundamental tension in the remit of the ICC that may cause problems for both CSOs and the people who telephone them.

Korzynski (2003) noted that the pain incurred by call centre employees occasioned by the anger of disenchanted customers is intense because these workers are employed for their pro-customer attitudes and seek this work because of the pleasurable aspects of service interactions. When the myth of "customer sovereignty" is shattered it is the front-line service worker who becomes the target of their anger (Korzynski, 2003, p. 57). In the case of the ICC not only the individual demands of callers, but also the CSOs' customer centric approach (a feature sought in

applicants for the role), will often clash with the imperative to provide information reflecting immigration law, government policy and INZ processes.

Immigration is a complex aspect of government administration that has a high public profile because its decisions have an impact on a large number of people. It generates numerous complaints to independent bodies that investigate the administrative conduct of state sector agencies such as the Office of the Ombudsman and Office of the Privacy Commissioner. In 2008 the Controller and Auditor-General was asked to conduct an inquiry into INZ following allegations about the integrity of its operations. That review did not find widespread integrity issues, but did identify a need for INZ to improve systems and processes used to support decision-making. Among the main findings were substantial variation between branches in the overall quality of visa decisions and the systems and practices each branch used to make decisions and targets that focused on quantity not quality. A further report from the Controller and Auditor-General in November 2010 indicated INZ was improving the quality of its decision-making. Immigration is a litigious area of government administration and many migrants engage representatives well schooled in immigration law and policy to represent them in their dealings with INZ. The immigration advice industry is around 30 years old and in 2012/13, 12 per cent (63,741 applications) of all visa applications were recorded as having been advised (from licensed and exempt advisers) (Martin, Jenkins, & Associates Limited, 2014).

The introduction in 2007 of a regime to regulate the conduct of immigration advisers was important because of the potential consequences of incompetent and unethical advice. These include damage to New Zealand's reputation as a migrant destination, pecuniary loss to individuals due to excessively high fees, as well as career damage, personal hardship and family dislocation (Martin, Jenkins, & Associates Limited, 2014). The Immigration Advisers Licensing Act (2007) makes it an offence for anyone other than a licensed adviser or exempt person to provide immigration advice. From 2009 all immigration advisers providing advice within New Zealand have had to be licensed in accordance with the Immigration Advisers Licensing Act (2007).



Offshore advisers giving advice to people seeking visas have had to be licensed from 4 May 2010. Someone who is exempt from licensing under the Act can also provide advice to prospective immigrants. Exempt groups include New Zealand public service employees providing advice within the scope of their employment agreement, lawyers, Members of Parliament and their staff, foreign diplomats and their staff, and employees of community law centres and Citizens Advice Bureaux and those who provide advice offshore on student visas (Immigration Advisers Authority, 2014c). Licensed advisers, lawyers and offshore student agents charge for their services, whereas the other exempt people do not. In many situations immigrant representatives will be consulted when applicants anticipate or experience problems. Some will engage immigrant representatives to liaise on their behalf with Immigration New Zealand. Unsuccessful applicants may engage representatives when seeking reviews or lodging appeals. Other reasons people consult immigrant representatives as intermediaries with Immigration New Zealand are lack of time, lack of English language skills, fear because they are in New Zealand unlawfully, uncertainty as to whether they qualify for a visa, a lack of confidence dealing with government officials, or they come from a country where dealing with officials is different from how it is done in New Zealand (Martin, Jenkins, & Associates Limited, 2014).

The ICC CSOs are warranted immigration officers having received the required training. The ICC has a business-to-business team responsible for providing information to 'expert callers', namely licensed immigration advisers and exempt people, although overflows of calls are answered by other CSOs (Department of Labour, 2012a). Experienced officers comprise the business-to-business team. Expert callers are thereby matched with 'expert CSOs'. In many situations migrant advisers will be approaching expert CSOs with complex problems and this may exacerbate the tension between service users and providers.

There is also tension for CSOs between quality and quantity in their public service that may not be experienced to the same degree in commercial centres. CSOs are required to invest a great deal of cognitive effort because of the global and therefore diverse nature of their callers and the

difficulties of applying complex immigration regulations to individual circumstances. Additionally, applicants often have very high personal stakes in INZ decisions requiring CSOs to perform emotional labour. All these factors can extend call-handling times and yet CSOs are required to meet challenging quantitative and quality objectives. The performance requirements of CSOs are formidable.

### **1.3 Personal interest informing this research.**

I was employed as an immigration officer with Immigration New Zealand for 10 years and worked as Appeals Manager in the National Office for four of those years. The latter position required an in-depth knowledge of immigration and related law and of immigration policy and procedures. I have worked as a private immigration consultant since 1991 and am a licensed immigration adviser. From 1998 when the Immigration Contact Centre was established I have been a caller requesting information.

I have a long-standing interest in the difficulties that can occur for callers and call centre employees when complex immigration matters have to be handled within the context of the brief interactions contemplated by the call centre model of service delivery. I hope this research will enhance our understanding of the work of Immigration New Zealand and also contribute to improving the work life of the ICC employees and to improving the experiences of callers to the ICC.

### **1.4 Relevance of this research.**

From the perspective of meeting MBIE's purpose to "Grow New Zealand for All" (MBIE, 2014a), the consequences of the performance of the Immigration Contact Centre are serious for New Zealand.

There has been limited research into New Zealand call centres (Hunt & Rasmussen, 2010). The New Zealand Public Service is required by the State Sector Act (1988) to be a "good

employer” and this includes the requirement to provide “good and safe working conditions”. Given the conflicting accounts of the effects of call centre work within the academic literature, it is important to investigate the experiences of New Zealand public servants working in the call centre environment. The considerable investment the ICC has made in developing staff competencies and reducing turnover and absenteeism provides a cogent reason for this research.

The bulk of the research on call centres focuses on call centre employees and there are few studies with call centre customers as participants (Bolton & Houlihan, 2005; Paulet, 2004). This study addressed the gap and interviewed both call centre employees and their expert customers.

### **1.5 Research questions.**

This study explores the expectations and experiences of two complementary groups: firstly, INZ call centre staff who provide information on immigration matters and secondly, the callers who request and receive information. The intention was to examine whether there are incompatible expectations between customer service officers and those who represent individuals in their interactions with INZ. The task of applying complex immigration law and policy to individual circumstances appeared to defy reduction to the short exchanges most call centres offer. Certainly the task seemed likely to make very strong demands on the resources of the staff and the study examined how employees experience this work. It looked at how CSOs identify and try to meet the complex information needs of global callers against a backdrop of rapidly changing policy that is not always easy to understand.

A business model used in routine commercial activities did not seem likely to comfortably accommodate the provision of information that can seriously affect the lives of individuals and, potentially, the prosperity of the country. The study examined how call centre staff manage emotion-charged interactions within strict time parameters when callers cannot achieve their immigration objectives. It considered how CSOs cope with this dilemma particularly in the light of the expectations of customer sovereignty created by commercial call centre culture and signalled by

the language of business used by this government department. Given that the ICC employees are selected for their customer-centric approach the study also looked at how the CSOs coped with their own responses when because of their 'gatekeeping' role they are not always able to help their callers, especially since they are simultaneously required to show empathy. The analysis also looks at how the transactional interactions associated with call centres compared with the notion of public service from the perspectives of both CSOs and immigrant representatives.

The positive and the negative aspects of immigrant representatives' interactions with the ICC and the issues they experience and expectations they have as advocates and intermediaries are explored. The immigrant representatives' method of coping with inconsistencies in the immigration system and questioning interpretations of complex policy appeared to create problems for the CSOs. The CSOs were approached with information gathered from immigrant representatives about their interactions with the call centre to find out what they thought. The indications are that there are many similarities in these two very demanding roles, but that the call centre model of work organisation frequently creates difficulties for both staff and expert users.

## Chapter 2: Literature Review

### 2. Introduction.

Call centres were under researched by academics until the late 1990s (Taylor, Mulvey, Hyman, & Bain, 2000). Now there is a proliferation of research. The psychological and sociological literature surveys a wide variety of subjects adopting various theoretical perspectives, examining the call centre model for its own unique characteristics and as a platform from which to study a range of other matters (Russell, 2008). Most studies focus on the experience of call centre staff leaving space for research on call centre managers and owners and on the experiences of callers. Research has typically involved private sector call centres that offer relatively low skill work (van den Broek, 2003) however in Australia it was estimated in 2004 that upwards of 20% of call centre activities involved the provision of public services (Burgess, Connell, & Hannif, 2005). Careers New Zealand (2014a) recorded government administration as a significant employer of call centre staff. The call centre at the core of this study is public sector run.

### 2.1 Defining a call centre.

Taylor and Bain's (1999) definition of the term 'call centre' is often quoted, namely a "dedicated operation in which computer-utilising employees receive inbound - or make outbound - telephone calls, with those calls processed and controlled either by an Automatic Call Distribution (ACD) or predictive dialling system" (p. 102). In 2004 Burgess and Connell noted the label 'contact centre' often replaced 'call centre' to reflect the use of communication channels in addition to telephones. There appears to be general accord in the literature about what constitutes a call or contact centre. The fundamental distinguishing feature continues to be the means of production, namely integrated telecommunication and information systems technologies that enable employees to interface directly with customers and simultaneously retrieve information from or enter information into a computer, and enable managerial control over the distribution and pace of work, and electronic monitoring of performance (Healy & Bramble, 2003; Russell, 2008; Taylor & Bain,

1999; Taylor et al., 2000). The terms call centre and contact centre will be used interchangeably in this study.

## **2.2 Why have call centres?**

The call centre model was established because of the cost efficiencies and competitive advantage offered by centralising customer service and promotion and sales operations (e.g., Hauptfleisch & Uys, 2006; Martí-Audí et al., 2013; Russell, 2008; Taylor & Bain, 1999, 2005). Originating in the USA the model was adopted by the finance, travel and telecommunications sectors in the UK in the 1980s (Arzbächer, Holtgrewe, & Kerst, 2002; Bain & Taylor, 2002; Taylor & Bain, 1999). Now call centres serve a wide range of sectors in many countries (Burgess et al., 2005; Burgess & Connell, 2006; Holman, Batt, & Holtgrewe, 2007).

Call centre technology means that customers can be solicited and served through multiple channels (phone, email, text, live chat and social media) over a wide geographical area from any location eliminating the need for organisations to offer face-to-face contact. The declining costs of data transmission, long distance telephony and IT maintenance, facilitate locational possibilities (D'Cruz & Noronha, 2007; Holman et al., 2007). Call centres reduce labour costs because they allow speedier and cheaper transactions per customer than is possible via face-to-face interactions (Korczynski 2002; Russell 2009). Call centres allegedly raise service levels, standardise customer interactions, and deliver more consistent service by acting as a central point for enquiries (Korczynski 2002, 2003; Russell, 2009). Call centres answer consumer demand for easy access and enable market gains through continuous operation (Burgess, Drinkwater, & Connell, 2005).

Centres can be established in locations that deliver cost benefits such as low overheads and strategic benefits such as access to new markets, unemployed labour and to language and information technology skills (Burgess & Connell, 2004; Burgess et al., 2005; Larner, 2001; Paulet, 2004). Other locational incentives include rates relief, regional development subsidies and beneficial taxation arrangements. Weak labour market regulations and worker representation may

attract call centre owners (Burgess et al., 2005). Furthermore, call centres can be quickly relocated in response to political or economic pressure because they require relatively low capital outlay, have access to off-the-shelf technologies, and are supported by a technology-sales and consulting industry that provides services to most of the world (Batt, Holman, & Holtgrewe, 2009; Flecker 2007). Together with the deregulation, privatisation and ‘marketization’ of national services there are few obstacles to entry (Batt et al., 2009; Jeong, Bekmamedova, & Kurnia, 2012).

Given the emphasis on maximising profits by reducing costs, the tight control over the distribution and pace of work that call centre technology provides, is a strong motive to establish call centres (Burgess et al., 2005; Healy & Bramble, 2003; Russell, 2009). Another advantage is the ease with which information on employee performance can be collected, particularly given the difficulties of measuring individual output in the service sector (aside from sales) (Hutchinson, Purcell, & Kinnie, 2000; Korczynski, 2002; Russell, 2009). Additionally, the call centre serves as a mechanism for collecting intelligence about customers and their responses to products and/or services, and on the performance of the wider operation. The call centre’s isolation as a cost unit and its transparent output is also attractive (Houlihan, 2001). The introduction and increase in call centres can be attributed to the cost efficiencies they offer as well as the requirement to satisfy customer demands for easy access (Burgess & Connell, 2004). The co-existence of these two driving forces (customer orientation and cost-efficiency) plays a major part in the experience of call centre work (Taylor & Bain, 2005).

### **2.3 Types of call centres.**

Call centres vary in function, size, management styles and human resource practices, and the quality of the jobs, wages and working conditions they offer (Batt et al., 2009; Burgess & Connell, 2004; Taylor et al., 2000). Holman et al.’s Report of the Global Call Centre Network in 2007 found similarities in 2,500 call centres, employing 475,000, between 17 countries in their age, markets, operations, customer segmentation, services, the length of calls, and organisational and workforce

characteristics. It was the first international study of call centre management and employment practices and provides an overview of the industry, albeit there is a risk of bias because only call centre managers completed the survey.

Holman et al. (2007) found most centres (79%) dealt with inbound calls only and 67% of call centres served the parent organisation's customers. Compared to in-house call centres, subcontractors tended to be under greater cost pressures, made more use of contingent labour, offered lower discretion jobs and higher levels of monitoring, paid lower wages, and were less likely to be covered by union contracts (Holman et al., 2007). Centres can be owned by local, regional and national, public, private and not for profit organisations of any size (Burgess & Connell, 2004). Holman et al. (2007) found most centres (86%) served their domestic market.

The purpose of call centres can be service and/or sales and their function further separated into market research and other survey work, promotion, technical assistance to support products or services, debt collection, fund raising, and the provision of government and professional services (DMG Consulting LLC, 2009; Holman et al., 2007; Russell, 2008). Customers may be members of the general public, mass-market customers, 'high-value' business customers and internal customers (Holman et al., 2007). Call centres have flat structures with around 12% of employees in management roles (Holman et al., 2007).

Holman et al. (2007) found differences in call centre work organisation and human resource practices across countries. To ease comparison they categorized countries by way of co-ordinated (social) market economies - Western Europe and Israel, liberal market economies - Canada, Ireland, USA and UK, and emerging market economies - Brazil, India, Poland, South Africa and South Korea. Better quality jobs were found in co-ordinated economies with strong labour market legislation and institutions. Holman et al. (2007) noted the percentage of call centres with low job discretion was 39% in co-ordinated economies, 49% in liberal market economies and 34% in emerging ones. Despite the notion call centre work is low skilled, 22% of employees had university degrees. Fifty per cent of call centres had some form of collective representation with the highest in



co-ordinated market economies. Decentralised industrial relations systems found in liberal market and emerging economies supported the large wage differences found across their call centres, compared with call centres in co-ordinated market economies. Around one third of the call centre workforce across the countries studied had one year of tenure or less. Tenure was longer in co-ordinated market economies (Holman et al., 2007).

## **2.4 Growth of call centres and the call centre industry.**

The literature emphasizes the exponential growth of call centres in most countries in the last two decades (Hauptfleisch & Uys, 2006; Holman et al., 2007; Martí-Audí et al., 2013). Batt et al. (2009) noted that the majority of governments do not keep official statistics on call centre employment. Such information usually comes from the industry itself or associated consultants (Burgess et al., 2005). The various configurations of call centres make it difficult to obtain data about their number (Arzbächer et al., 2002; Russell, 2009). Burgess and Connell (2004) noted that because call centres are either in-house components or standalone businesses subcontracted to serve customers on behalf of one or several other organisations, call centres were not officially classified as an industry and were considered derivatives of the organisations they serve. Despite this the literature often refers to the call centre industry (e.g., Batt et al., 2009; Gilmore, 2001; Holman, 2013; Martí-Audí et al., 2013). The Australian Union Research Centre for Organisation and Technology (URCOT) (2000) study indicated most employees experienced a strong sense of belonging to the call centre industry rather than to their employer. This was attributed to many in-house centres being situated in a different locale to the wider organisation. Separateness may be accentuated by the feeling many workers expressed that they are “looked down upon” by colleagues in parent organisations, that the interpersonal communication skills they use to perform effectively are not recognised, that employers do not value their work and that people outside centre work do not really understand the nature of the work (URCOT, 2000, p. 11). Call centres are recognised as

an industry in the Australian and New Zealand Standard Industrial Classification (ANZSIC) 2006 (Australian Bureau of Statistics (ABS), 2006).

## **2.5 New Zealand call centres.**

In 1999 the New Zealand Call Centre Attraction Initiative was launched to internationalise call centre services (Larner, 2002). By 2002 there were concerns that instead of providing high skill centres offering high wages, New Zealand would become a source of cheap labour for large outsourcing companies (Larner, 2002). There appears to be renewed effort to establish New Zealand as a call centre destination for offshore organisations (O'Sullivan, 2013). ANZSIC 2006 (Statistics New Zealand, 2014) reported the New Zealand contact centre employee count at 2060 for 2011, 1780 in 2012 and 2060 in 2013.

Call centres have become significant service providers, as well as employers, internationally and in New Zealand (Hunt & Rasmussen, 2010). It is important that this organisational design is examined for its effects on customers and the employment it offers, in the interests of employees and of centre owners and users, given historically low tenure rates and high turnover and absenteeism rates (Holman et al., 2007).

## **2.6 Call centre skills - introduction.**

The level of skill required to perform call centre work has received relatively little attention in the literature (Russell, 2008). Skill is important because of the contrasting claims about the nature of call centre work and the ramifications for job quality. The often-competing drives of customer service and cost-efficiency (Korczynski, 2002) have a significant effect on the skills demanded of employees. The emphasis on one drive or another can vacillate within a centre so while the focus may be on quality one day, it could shift to quantity the next (Anderson, Pyman, & Teicher, 2006). It is also the case that the same centre may have a section focusing on satisfying quality criteria while another is focused on call volume (Taylor et al., 2000). In their study of German call centres

Arzbächer et al. (2002) found staff selection was geared towards identifying people with the facility to cope with these shifting pressures.

Whether call centre work is considered skilled will depend on the definition of 'skill' and how it is measured. Spenner (1990) concluded that there is no agreement on a single set of questions to measure skill, but empirical research suggested two organizing dimensions of job skills useful to explore in skills studies, namely substantive (job) complexity (level, scope and integration of mental (data), manipulation (things) and interpersonal (people) tasks in a job) and autonomy control (discretion available within a job to control the content, manner and pace with which tasks are completed). Rose (1994) suggested exploring the relationship between the skill demands of the job and the skills individuals bring to their work.

By the late 1990s/early 2000s there were several perspectives on call centre skills, ranging from that of the semi-professional knowledge workers 'smiling down the phone' and serving as their organisation's ambassadors by using their interpersonal and information technology skills to deliver a customised service (e.g., Austin-Knight, 1997; Durr, 1996; Hook, 1998), to that of de-skilled agents performing repetitive activities and controlled by electronic monitoring and performance measurement (e.g., Fernie & Metcalf, 1998; Stanworth, 1998). Taylor and Bain (1999) focussed on the Taylorization of the labour process encountered in many call centres, which inferred de-skilling. A contrasting position is taken by those who recognised the drive to gather revenue by customising services (Frenkel, Tam, Korczynski, & Shire, 1998). This group presented a more optimistic picture stressing unique customer/agent interactions and their associated unpredictability that demand the use of discretion and limit routinisation (Dose, 2002; Frenkel et al., 1998; Frenkel, Korczynski, Shire, & Tam, 1999; Korczynski, 2002). Frenkel et al. (1998, 1999) predicted that call centre agents were part of the trend towards 'knowledge work'. Another view suggests customer segmentation results in variation in the complexity of call centre work (Batt, 2000; Kinnie, Hutchinson, & Purcell, 2000). Russell (2006, 2009) concluded that call centre work is 'semi-skilled'.

### 2.6.1 Call centre skills - a unique labour process and 'de-skilling'?

Taylor and Bain (1999) emphasized that call centre technology structures a unique labour process for the delivery of services. Employees converse with callers by telephone, simultaneously interpreting information on computer screens and entering data. The overarching facility for surveillance, monitoring, electronic data capture and measurement of performance against operating procedures and targets means the efforts of individual employees are open to scrutiny and therefore criticism. Stringent selection processes, standardised training, and service standards seek to elicit the required behaviour of employees and thereby control the quality of the work (Taylor & Bain, 2005).

Call forcing delivers calls automatically to agents who are available (van den Broek, 2004). In some centres, agents can select when to take calls by switching the phone to "ready mode" (AnswerConnect, 2013). In some organisations red reminder lights attached to phones are activated when the queue reaches a certain length (Russell, 2002). It is the agents' awareness of calls waiting for allocation (sometimes highlighted by a statistical display of the number of calls waiting and average waiting time) that exerts pressure on the speed of production (Callaghan & Thompson, 2001). Referring to the queues of calls, Taylor and Bain (1999) likened this labour process to "an assembly line in the head" (p. 109).

Workers have little control over the rate at which they attend to calls because they are encouraged to be 'voice ready', that is, ready for or taking calls most of their shift (Taylor & Bain, 1999). The process of attending to communications and after call work is segmented and each part is usually allotted a target timeframe in which agents are required to move through it (Bain, Watson, Mulvey, Taylor, & Gall, 2002). When a call has ended, the agent may need more time to finish their "wrap up" work beyond the time allocated and so they must put themselves on "wrap up" mode (Ferne & Metcalf, 1998). Any other times when agents are not ready to take calls are usually described as "idle" and these are closely monitored and measured (Ferne & Metcalf, 1998).

Call centres tasks are often repetitive and standardised. Technology can routinise interactions through screen templates that lead the call via prescribed steps even though caller needs may require a different sequence (Taylor & Bain, 1999). Scripts are often employed to standardise conversations.

The call centre labour process has been associated with the Taylorism of white-collar work (Taylor & Bain, 1999, 2001, 2005) and with de-skilling (Russell, 2008). Inspired by Marx, the labour process theory of work organisation under capitalism assumes the economic exploitation of the worker (Frenkel et al., 1999). It is critical of scientific management and employs concepts developed by Braverman (1974) in his thesis on the degradation of labour. Frederick Taylor's theory of scientific management was designed to improve economic efficiency, particularly through labour productivity in manufacturing (Braverman, 1974). Its themes included reducing jobs to their simplest components (transferring knowledge about how to do the job from worker to management), separating conception, planning and execution to lessen the power of the worker and assigning components to different workers, increasing control over what and how tasks are executed and improving workers' output through standardization (Braverman, 1974). Taylorisation is therefore associated with de-skilling, less worker discretion and task variation, and work intensification (Taylor, Baldry, Bain, & Ellis, 2003). Taylor and Bain (1999) noted that even in call centres that demanded complex responses and where quality was prioritised, the labour process remained repetitive and assembly-like. Very complex tasks can be de-skilled by channelling work through the call centre labour process although this can erode the very service the centre was established to provide. To give an example, van den Broek (2003) traced the de-skilling of child protection work in a public service call centre. De-skilling resulted from excluding employees from the design and implementation of the technology, emphasizing quantitative outputs, reducing training, and fragmenting and routinising tasks with the result that case workers found it increasingly difficult to apply their professional skills.

The connection between call centre work and the process of de-skilling seems convincing given the high level of managerial control, standardised jobs, and the developments in technology (e.g., interactive voice response, web self-service) that remove the need for human contact. On the other hand, technology can increase job complexity. Multi-channel centres offer ever-increasing methods for customer interaction that demand new skills (Batt et al., 2009). Electronic division of work can result in allocating more complex calls to specialised teams that develop expertise. Numerous studies demonstrate call centre work does not mirror factory assembly line work (Batt & Moynihan, 2002; Frenkel et al., 1998; Hutchinson et al., 2000). Instead of working on separate parts of a process, call centre agents can be responsible for the whole job cycle even if it is short. In many cases agents are required to have an understanding of the employing organisation beyond that expected by a process worker on a factory assembly line and they often exercise more responsibility (Russell, 2009). Unlike the factory assembly line there are often variations in the amount of work per call and call centre agents are able to control how quickly they handle a call (Russell, 2002, 2009). Variations in call handling times or halts in the work will not significantly affect production because agents work independently unlike the interdependent contributors on a product line (Callaghan & Thompson, 2001). Neither is the work as predictable as assembly line jobs because service delivery occurs through human interaction. While that can be specified and routinised, it cannot be entirely controlled (Leidner, 1993; Russell, 2009).

Russell (2009) proposed that contrary to the de-skilling of jobs, informational work recombines tasks, however this does not result in worker autonomy. Increased job span means there is even more need to manage the work, particularly when it involves a discretionary element hence the detailed specification of how work must be done to make it transparent and therefore open to evaluation. If the work process resists standardisation, more effort is invested so processes are documented to ensure scrutiny and accountability (Russell, 2009). In either case the indications are that workers are not trusted to do their work.

Some researchers draw very clear connections between the labour process and skills. Ellis and Taylor's (2006) longitudinal case study contrasting the experiences of British Gas's employees, pre and post call centre, gave a detailed account of de-skilling. Pre-call centre, the labour process was infused with a sense that employees could be trusted to do their jobs. Reports after the call centre model was implemented indicated a substantial drop in job quality and a withdrawal of trust in employees. Labour process theorists Thompson, Callaghan, and van den Broek (2004) observed a contradiction between the types of positions to be filled (that is in routine service work) and the heavy investment in recruitment, selection and training usually reserved for jobs with high discretion. They (2004) concluded the mismatch was to ensure workers were selected for social competencies, which are more difficult to identify than technical skills. Thompson et al. (2004) proposed most organisations would continue to offer high-volume, standardised work. Nevertheless, they did not agree that call centre work was de-skilled and considered it a new form of interactive service work that relies on social skills, neither assembly line nor white-collar "mental labour".

### **2.6.2 Call centre skills - gender.**

The majority of call centre employees in most countries are women (Belt, 2002; Belt, Richardson, & Webster, 2002; Holman et al., 2007; Mulholland, 2002; Russell, 2009). Holman et al. (2007) found 71% of the call centre workforce was female. The concept of skill is gendered according to feminist theorists (Richardson, Belt, & Marshall 2000). Historically labour performed by women has been undervalued and poorly rewarded, as have the associated skills (Richardson et al., 2000). Richardson et al. (2000) attributed in part the low social status of communication and customer service skills required to the fact call centre work was female-dominated. Call centre work involves clerical and social skills, both traditionally associated with women (Batt et al., 2009; Fearfull, 1996; Thompson et al., 2004).

The gendered pattern of call centre employment is in part related to employers ascribing the competence to relate politely with customers, including demanding and abusive ones to women as naturally occurring, a failure to recognize social expertise as skill (Batt et al., 2009; Belt, 2002; Belt et al., 2002; Callaghan & Thompson, 2002; Mulholland, 2002; URCOT, 2000). In contrast Belt et al. (2002) found agents reported they worked hard to develop such skills. Belt et al. (2002) observed in their study of call centres in three European countries that despite management recognition that social skills were critical to successful call centre work, their traditional association with women afforded them little financial reward. While there are attempts to recognise women's social competencies as skills by including these in qualifications, they remain undervalued. In New Zealand, call centre manager qualifications have a maximum rating of level 5 on the NZ Register of Qualifications, where level 1 is the least complex and level 10 the most.

Belt et al. (2002) identified that women were concentrated in the lower paid, more routinised customer service occupations compared with sales and computer 'help-desks', where males dominated. Male agents were less frequently monitored and paid more (Belt, 2002; Lerner, 2001). Scholarios and Taylor's (2011) empirical study of four Scottish centres indicated that women continued to be disproportionately represented in mass production call centre roles compared with customised centres and team leader and management roles.

While call centres provide employment opportunities for women these are circumscribed by the provisional and flexible nature of the work (Bonds, 2006). Belt (2002) noted management in 11 call centres deliberately recruited women workers over 40 years of age and those with children. She found managers valued female staff because they were viewed as content to remain as agents and therefore provided stability. Furthermore, women were recruited on the assumption they could better cope with repetitive, regimented work (Belt et al., 2002). Despite the lack of promotion opportunities Belt (2002) found women made up the majority of team leaders, half of the team managers and managed five of the centres in her study. Scholarios and Taylor (2011) and Belt (2002) found women had longer tenure, which increased the odds of promotion. Progression



beyond the team leader position was limited because of the small number of managerial positions. Belt's (2002) research also indicated that managerial positions in in-house call centres were isolated from management roles in the overall business further reducing advancement possibilities. Centre managers said peers in the wider organisation misunderstood the complexity of their roles and their positions were considered expertise-based and thus their skills were not readily transferable. Nevertheless Belt (2002) discovered that female agents and managers regarded call centres as 'female-friendly' workplaces that offered promotion prospects based on merit. Scholarios and Taylor's (2011) conclusion was bleaker finding that women's domestic responsibilities and supervisor stereotyping because of domestic status limited women's careers.

Not only are more women recruited for call centres due to assumptions they naturally possess the ability to relate politely with customers including abusive ones, females are also more likely to report abusive customers as a serious matter than males (Korczynski, 2003). The requirement for agents to be polite even to abusive callers implies emotional labour (Hochschild, 1983).

### **2.6.3 Call centre skills – emotional labour and emotion work.**

The exercise of emotional labour is one of the social skills sought in call centre agents. A theoretical construct devised by Hochschild (1983), it "requires one to induce or suppress feeling in order to sustain the outward countenance that produces the proper state of mind in others..." (p. 7). Emotion management becomes a commodity in jobs where there is face-to-face or voice-to-voice contact with the public, where the employer prescribes the emotion and behaviour required to create the desired emotional state in another person (Hochschild, 1983).

Emotional labour requires surface and deep acting (Hochschild, 1983). Surface acting uses the visible aspects of emotion to evoke the organisationally required reaction in others. The actor may not experience the feeling, but works at appearing to (Hochschild, 1983). Deep acting involves re-evaluating events or drawing on emotion memories to produce the required feelings by

imagining that a recalled circumstance, which generated the feeling, is occurring. The person employs the sense of “as if” this were happening now in the course of trying to feel the employer-prescribed feeling (Hochschild, 1983, p. 42).

The potential downside of emotional labour is where the commodification of an employee’s emotions leads to an alienation of feeling from the self. Hochschild (1983) names three approaches workers may adopt and the associated risks. In the first, the worker identifies completely with the job and the organisation and does not consider herself to be acting. She is not readily able to depersonalise inappropriate comments or behaviour and risks burnout. In the second, the employee develops a healthy separation from her work role, is therefore less at risk of burnout, but may be self-critical for consciously acting her role, perhaps feeling hypocritical. In the third, the worker understands the need to act, clearly distinguishes herself from the role she plays and accepts no blame for this. She risks estrangement from acting altogether and may appear insincere. The challenge is to manage the flow of self into the role in a way that limits the stress the role brings. Hochschild (1983) noted that this process is aggravated if conditions are such that it becomes impossible to deliver emotional labour. In a call centre this could occur when throughput targets are so demanding it is not possible to spend sufficient time attending to callers so they are left feeling satisfied and valued. There are findings that support Hochschild’s (1983) belief that the more control the employee has over the conditions of their work, the less harm is occasioned by emotional labour. Deery, Iverson, and Walsh (2002) found that call centre workers were more likely to suffer emotional exhaustion when management prioritized throughput rather than service quality and required employees to comply with rigid rules on self-presentation even when callers were abusive and demanding. Holman (2003) called for call centre employees to have more control over the emotions they display to reduce emotional dissonance. Zapf, Vogt, Seifert, Mertini and Isic’s (1999) study indicated that call centre workers experiencing emotional dissonance in their emotional labour might well experience psychological strain. They found though that emotional dissonance was significantly negatively correlated with the degree of influence an employee has in

their client interactions. Frenkel et al. (1998) found the more influence call centre employees had over how they carried out their work, the less likely they were to report stress.

Hochschild (1983) acknowledged the pro-social effects of emotional labour and that many employees enjoy their work with people. Zapf et al. (1999) found in their call centre sample the expression of positive emotions and the requirement to consider the feelings of clients were positively and significantly associated with personal accomplishment. Totterdell and Holman (2001) found that call centre agents who felt or appeared more positive, rated their performance higher and felt less emotionally drained. Korczynski (2002) stressed the beneficial effects of emotional labour citing studies by himself (2001) and with Frenkel et al. (1999), that suggest pleasure may be derived from call centre work when employees experience autonomy particularly over feeling rules in their interaction with socially embedded customers. In their call centre sample Zapf and Holz (2006) found the requirement to display positive emotions had a significantly direct and positive effect on personal accomplishment. They (2006) noted the requirement to appreciate the emotions of the client showed a positive direct effect on personal accomplishment, but also a positive direct effect on emotional exhaustion indicating the more complex interactions tend to overstretch the employees' abilities to cope because of the continuous necessity to concentrate and process information while communicating with the client.

Hochschild (1983) observed that in private life it is accepted the feelings of people with higher social status are considered more important. In service work it is often a requirement to accept uneven exchanges in customer interactions. Korczynski (2002) makes a compelling case for viewing the concept of customer sovereignty as a myth which frontline service workers are obliged to do their best to sustain. Client attitudes and expectations contribute to employees' experience of emotional labour. The experience of emotion work in a professional call centre may be different from that experienced in commercial call centres. The social status of the employee, such as a social worker or nurse, may be equal to or higher than the social status of many callers. There may be deference on the part of callers and less incentive to perform emotional labour in a rationalised

fashion for the call centre staff. Professionals are accustomed to serving as their own emotion managers (Hochschild, 1983) and may resist attempts to supervise their emotional presentations. Professionals may exert more control over how they do their emotion work due to their high career capital (Russell, 2012). Employees may also struggle in exchanges where the social status of the caller is regarded as higher than the agent, but their authority is less. Russell's (2009) survey included such a centre where medical professionals called requiring authorisation numbers that would allow their patients' medication to be subsidised. That centre rated third lowest for workload manageability and this was partly attributed to the tense exchanges and disagreements between the agents and medical personnel who resented having to explain why they had prescribed particular medication.

Anderson et al. (2006) considered emotional labour was practised in public service centres because employees are accountable for their emotional presentation in service interactions and require an emotional understanding of the callers' needs. All agents in their study of two large Australian public service call centres considered their work required highly skilled emotional labour. In public service call centres it seems reasonable to expect the strength of emotions communicated by callers confronting bureaucratic procedures will vary according to the business of the centre, with those providing human services or where potentially life changing information is given or decisions made, likely to increase the emotional load on agents. Anderson et al. (2006) noted that emotional labour did not however result in high levels of stress and attributed this to better working conditions in the public sector including the acceptance of unions. Following Russell's (2009) survey of Australian call centres, eight of which were public sector organisations, he concluded that emotional labour was experienced in info-service work and was positively correlated with work-related depression and job pressure. The more manageable the workload, the less emotional labour was exercised whereas work pressure was associated with greater emotion expenditure. Emotional labour was also inversely associated with skill. Russell (2009) speculated this was due to employees relating this to servitude.

Given the accountability of public servants to tax payers, political leaders, parliament and the judicial system, there may be more emphasis on ensuring the quality of information than on inducing or suppressing feeling “to sustain the outward countenance that produces the proper state of mind in others...” (Hochschild, 1983, p. 7). Anderson et al. (2006) found accuracy a priority alongside cost-efficiency and customer orientation. Korczynski (2002) noted the more a service business has to compete for business, the more frontline staff are required to endure ill tempered customers in case they take their spending power elsewhere. The pressure to perform emotional labour in a commercial call centre that faces competition, may be much greater than in a public sector centre where the host organisation has a monopoly on whether to bestow what the customers prize and therefore has “an unambiguous determinative power over customer behaviour” (Korczynski, 2002, p. 59). The public sector is in a unique position when customers cannot elect an alternative supplier (NZQA, 2012). Users of public sector services cannot truly be considered customers if there is only one organisation that has the power to bestow the service or product sought. Nevertheless in the attempt to create a business/market culture in public sector organisations the users of public services are treated as if they are “market-powerful” (Brereton & Temple, 1999, p. 471).

Emotional work appears inevitable in service work and its performance can engender harm or a sense of personal accomplishment and competence (Hochschild, 1983; Korczynski, 2002; Totterdell & Holman, 2001; Zapf et al., 1999). There is some consensus that the experience of harm and pleasure encountered by performing emotional labour depends on manageable workloads, whether staff are required to pay constant attention to the callers’ feelings, the level of autonomy workers have to control their interactions and the response their emotional labour receives (Korczynski, 2002; Russell, 2009; Zapf & Holz, 2006; Zapf et al., 1999). Not associating emotional labour with skill may reflect a failure to recognise social expertise, including emotional labour, as requiring skill (Belt, 2002; Belt et al., 2002; Callaghan & Thompson, 2002; Mulholland, 2002; URCOT, 2000). The degree of emotional labour exercised by employees may depend on the type of

call centre, whether private and operating in a true market or public sector operating in a pseudo-market or professional where professional employees may have no pressure to defer to callers.

Increasingly customers of services are seeking quality in service provision (Korczynski, 2003) and when interacting with call centres delivering professional services customer expectations of agents' behaviour or presentation may vary from those they have of agents providing less complex services. Where the core business of the call centre significantly affects their life callers may be particularly sensitive. This may create considerable stress for public sector call centre employees who need to balance the requirement for empathy with the requirement to apply rules and regulations impartially. Emotional distancing, disengagement or detachment appears to be a strategy for coping with emotional labour, similar to Hochschild's second approach described above. 'Detached concern' is a construct mentioned in research on the experiences of staff in human services, and particularly in the medical environment, as a functional mechanism that allows professional care without becoming so emotionally involved one cannot do the work (Maslach, Schaufeli, & Leiter, 2001). Maslach, Schaufeli, and Leiter (2001) referred to detached concern as the ability to moderate "... one's compassion for clients by emotional distance from them..." (p. 400). With regard to the use of emotional detachment in call centre work, Frenkel et al. (1998) noted the requirement for employees to have a positive, friendly and tactful approach while remaining personally disengaged to protect him or herself against customer abuse. Korczynski (2003) reported a trainer's suggestion that agents develop a mental and emotional distance between their body, ears and voice on the one hand, and their minds and emotions on the other to manage their feelings when encountering customer anger and abuse. In fraught service interactions employing emotional detachment or distancing as a functional mechanism that allows the expression of empathy without becoming so emotionally involved one cannot provide the service, may be an appropriate coping strategy albeit there is an associated risk of employees feeling insincere or developing cynicism.

#### **2.6.4 Call centre skills - matching skills to customer value.**

Some researchers (e.g., Batt, 2000; Houlihan, 2002; Kinnie et al., 2000) focus on the variation in call centre types. The idea is that centres vary in work complexity (and thus the skills required) as they range from mass-production (maximum volume, minimal costs) and transactional repetitive work, to hybrid forms titled mass-customisation (delivering variation at the lowest possible cost), through to professional services (quality service to high-value customers) and a relational approach to customer service. Batt's (2000) survey of call centre managers in a US telecommunication company identified that human resource systems and management practices varied significantly by customer segment served. Skill level varied, reflecting the complexity, potential value of and demands of the customer segment served. Agents serving high-value customers had more discretion to use their skills. Batt and Moynihan (2002) found 'higher involvement' residential centres had significantly lower quit rates and higher sales. This indicated that call centre work provides opportunities for the skilled employee.

Houlihan (2002) employed data from British call centres to study the use of low discretion job design combined with 'high commitment' management practices. She found four characterisations of 'low discretion, high commitment' and concluded that despite 'high commitment' strategies, the low discretion environment could undermine these. Taylor and Bain (2005) found that even in centres focusing on quality service, the labour process was generally repetitive and stressful. Houlihan (2002) concluded however that the description of call centre work as routine and low discretion did not do justice to the emotional labour and discretionary work effort required of some call centre workers and the skills to perform it.

#### **2.6.5 Call centre skills - interactive service work.**

Some researchers stress the unique and therefore unpredictable customer/agent interactions of call centre work, that limit routinisation (Korczynski, 2002). Direct supervisor control, routinised behaviour and rigid compliance with rules will not suffice in the aim to customise services because

it is impossible to prescribe for every interaction (Korczynski, 2002). Nor would the latter be desirable given that to satisfy customers staff must have some discretion to diverge from standard procedures when adherence ignores individual requirements (Leidner, 1993).

These writers recognised the tension between the impetus to achieve cost efficiency through standardisation and the revenue to be gathered by winning customers by tailoring services. They emphasise the importance of service workers in markets where customer service is the primary factor distinguishing organisations from their competition (Frenkel et al., 1999). They predicted that with customisation of products/services, increasing product variety and frequently changing product information and procedures, service work would become more complicated and agents would require higher-order social skills, contextual knowledge to answer complex enquiries, and to convince potential buyers (Frenkel et al., 1999). They predicted that 'semi-professional' customer service representatives would deal with the more challenging tasks while simpler tasks would be handled by automatic voice response, the Internet or teleworkers. Following qualitative and survey research into call centres in the USA, Japan and Australia, Frenkel et al. (1998) found staff engaged in both standardised and customised responses - bound to follow rules and to refer on complex problems, but with scope for employing discretion to win and retain customers.

Theorists who emphasize that call centre work is becoming skilled have critics. Taylor et al. (2000) noted that Frenkel et al. (1999) failed to distinguish between types of call centres. This was important because they vary on the spectrums of quality and quantity, routinisation and customisation. Thompson, Warhurst and Callaghan (2001) clearly distinguished the interactive service work of call centres from 'knowledge work' observing it is front-line employees' tacit and social competencies rather than theoretical knowledge that employers require. Later Frenkel et al. (1999) judged call centre staff employed lower- and higher-order contextual knowledge and were limited to responding to routine enquiries and conducting simple transactions, neither encouraged to extend nor apply theoretical knowledge.



### **2.6.6 Call centre skills - and contradictions.**

In many call centres tensions and contradictions are created by the oft-opposing drives of cost-efficiency and customer orientation (Korczynski, 2002; Taylor & Bain, 2005). Russell (2002) noted that 63% of the workers in a large Australian call centre experienced conflict between providing high standards of customer service and meeting the volume of call demands. Korczynski (2002) stated customer-oriented bureaucracy demands management emphasises both qualitative and quantitative performance resulting in a challenge to elicit contrasting behaviours from employees. Houlihan (2001) found managers constantly shifting priorities attempting to balance quality with quantity, standardisation with customisation, and staff motivation with satisfying service levels. Taylor and Bain (1999) also identified managerial preoccupations with the difficulties of reconciling the drives for quantity and quality and also for control and staff commitment. If meeting quantitative targets is emphasised then commitment and motivation suffer affecting service quality, but if throughput targets and surveillance are relaxed sufficient business may not be generated. They concluded that most centres lie at the quantitative end of the quantity and quality spectrum (Taylor & Bain, 2001). This leads to their rejection of the idea that the drives for customer orientation and efficiency are symmetrical (Taylor & Bain, 2005). For them it was capital's efforts to reduce costs and maximise profit that created and drives call centres. Viewed in this way customer service is important, but only because it contributes to profitable outcomes (Houlihan, 2001; Mulholland, 2002).

Whatever their relative strength, the drives for customer-orientation and cost-efficiency confront call centre workers with numerous contradictions. Deery et al. (2002) found the experience of contradictory but asymmetrical pressures (where management focussed too much on quantity rather than the quality of customer interactions) predicted emotional exhaustion and absenteeism. Conversely, agents who spent more time per call were less likely to experience emotional exhaustion. Agents faced with incompatible performance expectations may also experience role conflict and this in turn impedes their ability to provide high quality service and may also lead to

emotional exhaustion (Jackson, Schwab, & Schuler, 1986; Knights & McCabe, 1998; Leiter & Maslach, 1988; Schwab & Iwanicki, 1982).

Korczynski, Shire, Frenkel and Tam (2000) argued that info-normative control prevails in call centres. Technology provides information in order to check compliance with performance objectives, norms, rules and procedures and supervisors coach to reinforce performance norms and offer psychological support to create a culture geared to satisfying targets and customers (Frenkel et al., 1998). The operation of info-normative control produces two levels of contradiction that exert pressure on employees (Korczynski et al., 2000). Management cites the requirement to satisfy customers to justify electronic monitoring and measurement that implies low trust, while an atmosphere of high trust is required because the agent needs to be able to depart from set procedures to cater for unique customer needs (Kinnie et al., 2000; Korczynski et al., 2000). A further level of contradiction arises within the use of customer-related norms (Korczynski, 2002). People are recruited with pro-customer attitudes and customer-related norms are inculcated through various processes such as training and performance reviews (Korczynski, 2002). While management seeks customer orientation *and* efficiency and therefore prefers workers to identify with a *collective*, disembodied image of the customer, agents experience the concept of customer-orientation in their encounters with *individuals* (Korczynski, 2002). Management focuses on the collective image of the customer in their concern to reduce the time the *average customer* waits in the queue, while agents experience customer service in terms of how they were able to help *individuals* find solutions which could take some time (Frenkel et al., 1998, 1999). Furthermore workers stressed the satisfaction they gained from helping socially embedded customers (e.g., callers as mothers, husbands, children) rather than disembodied customers (Korczynski, 2002). Gutek's (1995) idea of 'pseudo-relationships' is applicable to call centre work with agents encouraged to use their first names and background data on customers to personalise their interactions. This contrasts with urgings not to develop relationships with customers so they call back asking to speak with specific agents because this could lengthen queues (Frenkel et al., 1999).

The conflicting logics of rationalisation and customer-orientation invest front-line workers with the authority for the exercise of discretion. Workers can justify their individualised service exceeding prescribed timeframes by referring to their customer-orientation (Korczynski, 2002). They may also cope with difficult calls by prioritising bureaucratic rules such as call time limits (Korczynski, 2002). Agents experience difficulties satisfying ‘two bosses’ with conflicting demands – the customer and management (Korczynski, 2002). This tension is encountered when agents perform the bureaucratic tasks required by management (such as dealing with calls as efficiently as possible) and in so doing are unable to sustain the impression of customer sovereignty (Korczynski, 2002). This will usually result in customer animosity directed at the agents rather than management (Deery et al., 2002; Knights & McCabe, 1998). Telephone communication widens the physical and social distance between the parties (partially disembedding the customer-agent interaction) and increases the likelihood of disenchanted callers venting their frustrations given they are dealing with a disembodied voice (Korczynski, 2003). The greater the technological mediation and social distance between parties the greater the likelihood of inhumane and disrespectful treatment (Bauman, 1989). This points to the contradictions that emerge in workers’ interactions with callers (Korczynski, 2002). Agents report immense pleasure from helping people and therefore feel keenly the pain inflicted when customers become discontented through rationalisation and focus their anger on call centre workers (Korczynski et al., 2000). Given the contradictory manifestations that inform the experience of call centre work there is little doubt that employees have to be able to shift “between tight regimentation and flexibility, matter-of-factness and friendliness, subordination and responsibility” (Arzbächer et al., 2002, p. 12).

#### **2.6.7 Call centre skills – semi-skilled work.**

Russell (2006, 2009) used the term info-service work to describe call centre work and posited the skill requirements depend in part on the degree to which either service or information tasks dominate interactions. When the former prevails, the information flow is usually in one

direction from caller to agent, who has then to respond to a relatively simple request, such as dispatching a courier. When the information component prevails, such as providing advice on social security benefit eligibility, there is a more complex two-way exchange. The agent uses interpretive effort to identify client needs and to assess their match with the organisation's policies and services and then communicates the information to the caller (Russell, 2006, 2009). Russell (2006, 2009) noted in the latter case the job cycle might be longer, involve greater agent discretion and resist standardisation. In these cases the interpretative effort (and associated skills) would be further increased if the callers have the knowledge to challenge the information provided.

Russell (2009) conducted a survey of call centre agents in 20 private and public sector call centres in Australia, using a skill index he developed, with the result that all the centres were considered to offer semi-skilled work. The call centre with the lowest mean score on the skill index confirmed Russell's hypothesis that when service predominates less skill is required. Russell concluded that work could not be considered unskilled either due to the high speed, accuracy and emotional control employed. Two public sector organisations located at the high end of the skill scale differed significantly from four other centres on skill. These centres offered jobs with high informational and interpretive components and one provided information on a wide range of government matters with the aim of "one-call resolution". A further government call centre, Social Services, ranked above the average level of skill, but ninth out of 20 centres despite the indications of heavy interpretive and decision making content. Russell (2009) did not include questions to tap the participants' view about the amount of information and service in their work. The call centre manager for Social Services stressed, "nothing here is black or white" (Russell, 2009, p. 120). Accuracy and findings defensible to both clients and managers were emphasised due to the serious consequences of an incorrect decision. Workers continually updated their knowledge as policies were always changing. Employees had to carefully question callers to identify relevant features in their unique situations and decide eligibility for and disbursement of benefits in accordance with legislation and policy. Yet Russell (2009) concluded that call centre work was semi-skilled pointing

to the weeks or months of training, contrasting this with years of training required for professionals. He pondered whether providing professional services via the call centre model might impact on whether this work can be considered 'knowledge' work.

### **2.6.8 Call centre skills - professional public sector services.**

It is more recently that centres providing public and professional services have become commonplace. Government call centres cover a wide range of areas from income tax to immigration. Some are combined with complex professional services such as child protection and career advice. Burgess et al. (2005) noted that in most call centres public sector services were complex compared with the private sector. Many interactions with public service centres will emphasise informational components rather than the service aspect of Russell's (2009) construct info-service work. Furthermore the experience of communicating with some public service and professional centres will be very different from dealing with commercial centres where the callers' idea of 'good service' may have been shaped. This requires agents to have the skill to manage expectations, which may prove difficult when the callers are heavily invested in the outcome of calls. In public service call centres administering government policy it is inevitable that some callers will not have their demands met. Government policy and individual aspirations do not necessarily agree, but there might be a perception that they should, given government employees are public servants and the recipients of their service are now often referred to in the language of business as customers.

Many public sector centres provide information on complex subjects that are difficult to communicate. Gelders and Walrave (2003) found the skills required to respond to general enquiries in a Flemish public sector call centre, differed from those associated with responding to calls about a business's products and services. Managers discovered that a customer-friendly approach was insufficient and preferred political knowledge, sensitivity to societal matters and the ability to probe latent information needs. Anderson et al. (2006) found that staff in two Australian government

centres needed technical, legislative and conceptual skills in addition to the ability to perform emotional labour. Surprisingly only 29% of public sector centres in Australia considered they require skilled workers (ACA Research 2004, cited by Burgess et al., 2005).

There are studies that explore the challenge of using call centres to deliver professional public services. Some of these challenges arise from matching the call centre as a socio-technical system and an entrenched labour process with employees with professional qualifications, ethical and legal obligations, strong occupational and professional identities, expert experience, established methodologies, and ongoing professional conflicts and traditions (Collin-Jacques, 2004; Collin-Jacques & Smith, 2005; Larsen, 2005; Russell, 2009). The studies show call centres delivering professional services can limit professional skills.

Van den Broek's (2003) study of 'Childline', a public sector centre in Australia providing child protection services, indicates the de-skilling of professionals. Agents had to listen to and question informants to clearly identify issues in order to complete risk assessments of child abuse, drawing on their decision-making skills. Despite reassurance by management the focus was not on call turnover, the familiar signs of mass production centres were readily identifiable. Reports that usually took an hour to write had to be produced in 20 minutes. Van den Broek questioned the feasibility and efficacy of delivering complex human services that often involved people in emotional distress, via a strategy of work intensification and de-skilling. The outcome of the tensions between quantity and quality often found in call centre work can have extremely serious consequences for the individuals at the centre of human services and those who provide them. Turnover was estimated to be around 30% representing a costly loss of qualified workers. Hanna (2010) found in the New Zealand National Contact Centre of Child, Youth and Family (CYF) that social workers had difficulties quickly and sensitively assessing complex situations presented by callers who were frequently distressed, frustrated and abusive, particularly when the callers' concerns did not meet CYF's thresholds for action. Social workers refined their questioning, listening, recording and time-management skills and they increased their competence in managing

callers' negative emotions. The participants highlighted the challenge of allowing callers to express their concerns while at the same time evaluating situations quickly and using technology to check and record information.

Collin-Jacques' (2004) comparative analysis of tele-nursing in England and Canada call centres found that professional skills and a quality service could be maintained or eroded, the former depending on whether nurses were dominant in shaping the profession. The telephone nursing process in Quebec was supported by a nursing-based infrastructure, followed an established telephone nursing service, was consistent with nursing practice, used a computerised infrastructure planned by nurses and allowed nurses to apply their clinical expertise. In England, state centralisation and oversight of public services and the authority of the medical profession in decision-making about nursing matters meant that nurses had not been able to shape tele-nursing practices. Larsen (2005) found nurses in an Australian health call centre gained greater control over processes as time passed, graded their own performance, and working parties were formed to consider flexibility in the advice nurses could give. Van den Broek (2008) noted from the preceding studies that it was not possible to standardise all aspects of social service and nursing practice because interactions between professionals and callers can be complex, unique, involve spontaneous solution-finding, and highly developed theoretical and contextual knowledge.

Russell's (2012) case study of an Australian tele-nurse service revealed management had difficulties imposing performance metrics and made adjustments to monitoring procedures and targets in response to the nurses' concerns. Russell (2012) emphasized the nurses' career capital affected managements' responses. The effort to cater to the demands of these employees is not likely to be invested in mass production or mass customised centres, for which the labour supply will be so much greater due to the lower skill requirements.

When call centres offer professional public services professionals are required to show 'measurable outputs' and they endure efforts to determine, control, monitor and measure their work. Case studies indicate that these professionals employ their occupational training, professional

practice and adherence to codes of conduct to justify their need to exert some control over their pace of work and how they carry it out, and thereby resist standardisation and quantitative targets.

### **2.6.9 Call centre skills – conclusion.**

Call centres perform a wide variety of functions on a continuum of complexity. Even when call centres do not deal in complex work, Grebner et al.'s (2003) statement that call centre tasks are often simplified underestimates the demands of the job. Call centre agents perform several activities simultaneously, usually at speed (Frenkel et al., 1999; Healy & Bramble, 2003; USDOL/ETA, 2013) and for this they require considerable ethno-methodological tact (Russell, 2009). They log on to the system, make or accept calls, listen to and converse with callers, which could include reading from knowledge bases or a script or following or overriding computer algorithms or other procedures, and they request, receive, understand, check and give information. They manipulate screen views, access databases to record or change information, retrieve or obtain and provide information or advice, solve problems and/or make decisions, or attempt to sell. Their interactions must conform to service standards (Frenkel et al., 1999). They usually record information following a call before they accept or make the next one. They may also use email, text, live chat and social media to communicate with customers. These activities require at the very least strong communication and people skills together with time-management and computer skills.

Batt (2000) emphasized she was not suggesting that serving mass production customers was low skilled work. Thompson et al. (2004) said that describing call centre work as de-skilled overlooks the social competencies and emotional labour required. Although Russell (2009) concluded that call centre work was semi-skilled, he also (2008, 2009) emphasized the importance of a nuanced approach to assessing call centre skills given this work encapsulates components of both 'Taylorism' and knowledge work. While centres share the coupling of telephone and computer technology, they are heterogeneous in many other respects. It is important to reassess the skills necessary for call centre work at intervals given the fast changing nature of this field as call centres



deliver more services. A multi-faceted approach that examines a wide range of factors to assess skill demands seems warranted.

## **2.7 Call centre work – the positives for staff.**

Research into the positive outcomes for employees of call centres is much less comprehensive than the contrary (Korczynski, 2002). Holman (2003a) reviewed empirical research he had undertaken (e.g., Holman, 2002, 2003b; Holman, Chissick, & Totterdell, 2002; Holman & Wall, 2002; Holman & Wood, 2002; Totterdell & Holman, 2001) on stress and well-being in UK bank contact centres and concluded levels of well-being compared favourably to manufacturing and clerical work. Healy and Bramble's (2003) call centre workers indicated they derived a sense of accomplishment from helping callers. Cross-national research (Frenkel et al., 1998, 1999) into call centres in Japan, Australia and the USA revealed workers derived satisfaction from helping people with 73% of 610 survey respondents reporting some satisfaction with their job.

Frenkel et al.'s (1998) survey found co-worker relations had a significant affect on job satisfaction. Given the emphasis on selecting centre agents for their social skills it is predictable that workers enjoy satisfying relationships with their peers. Frenkel et al. (1999) noted that call centre employees valued their positive relations with immediate colleagues significantly more than front line workers in sales and knowledge intensive work. Callaghan and Thompson (2001), Copas (2004), Frenkel et al. (1999), Redman and Mathews (1998), and van den Broek, Barnes and Townsend (2008) found both teams and informal relations between co-workers relieved stress by allowing employees to talk about difficult customers and alleviated the boredom occasioned by routinisation and repetition (Batt, 2000; Batt & Moynihan, 2002; Deery et al., 2002; Holman et al., 2007; Richardson et al., 2000). Korczynski (2003) also observed service workers sought support from each other in response to the stress of handling difficult customers thereby creating informal communities of coping. Batt and Moynihan (2002) found it was necessary to rely on colleagues to keep the information agents required to serve customers current because it was continually

changing. Van den Broek et al. (2008) noted that agents were quick to share with their team ways to shortcut the rigidity of the call centre technology in the interests of productivity. Frenkel et al. (1999) discovered agents were encouraged by management to look to their immediate co-workers for learning during training. In addition to providing a vehicle for learning, Batt and Moynihan (2002), Mulholland (2002) and van den Broek et al. (2008) noted peer support could also become a medium for collective resistance.

## **2.8 Working in public service call centres.**

Anderson et al. (2006) commented on the dearth of research on public service call centres yet in various countries, including New Zealand, the public sector is a large user of call centres. Most public sector research comprises case studies and focuses on the similarities between the private and public sector in regard to labour and management matters including turnover, monitoring and surveillance, skills and de-skilling, career opportunities, employee resistance and employee perception of team work in an individualistic labour process (Barnes, 2004; Russell, 2006; Townsend, 2004; van den Broek, 2003).

Burgess et al. (2005) described the reconfigurations to the Australian public sector driven by demands for cost-efficiency that led to competition for the delivery of services traditionally provided by that sector. Facilitated by developments in information technology, this provided fecund ground for call centres to provide public services given this model boasts cost-efficiency. The introduction of call centres to deliver public services in the UK was driven by similar demands (Bain et al., 2005; Houlihan, 2002). Along with the labour market and economic reforms in many liberal market economies, both Australian and New Zealand governments have tried to recast the management of government departments and state-owned enterprises along the lines of business enterprises (Anderson et al., 2006; Copas, 2004; Phang, 2006). In this vein we have seen the creation of a customer centred culture in organisations such as Centrelink in Australia (Humphries & Camilleri, 2002) and Work and Income in New Zealand (Copas, 2004). Call centres that apply

law and government policy will not necessarily provide information or make decisions that favour their callers yet they are required to be customer-oriented (Anderson et al., 2006). That some public sector services attract fees may increase the pressure on employees particularly if the payer does not receive the outcome they want. Alongside the public sector attempts to emulate private business practices lies the expectation that the traditional public sector ethos will apply. Jorgensen and Bozeman (2002) identified public service values as political accountability, rechtstaat (rule of law, due process, impartiality), equal treatment, regime stability, balancing interests, transparency, professional standards, personnel altruism and engagement, employee safety, and social cohesion. Copas (2004) concluded that the concept public service is commonly understood in terms of “helping people” (p. 170). Public sector accountabilities pressure call centres to present to customers and stakeholders an impression of efficiency and effectiveness. This in turn causes difficulties for staff. In a study on the quality of work life Hannif (2007) found that compared with a private sector centre in Australia, a public sector call centre emerged as inferior in job content, working hours and work life balance, and managerial styles. She attributed this to its multiple accountabilities to the public, government and its head office so that employee well-being was overwhelmed by extensive performance demands and legislative requirements.

Burgess et al. (2005) found the turnover rate in Australian public sector call centres similar to that of the private sector despite better work conditions, higher union membership and pay levels than in private sector centres. They attributed this to the higher daily call volume and a management focus on quantity that researchers (e.g., Deery et al., 2002) associate with stress, burnout and absenteeism. They also highlighted the stressful nature of calls in many public service areas. Healy and Bramble’s (2003) survey of an Australian public service call centre found that agents experienced relatively high rates of emotional exhaustion and depersonalization yet comparatively high rates of personal accomplishment.

Burgess et al. (2005) noted that just like their private counterparts the challenges for public service call centre employees included sustaining job commitment, financial rewards, and coping

with stress and surveillance. Centre managers faced the difficulties of balancing labour costs and call volumes as well as dealing with increasing demand, the requirement for information accuracy, and meeting callers' needs. In other words managing the tensions between quantity and quality, and service and efficiency. They (2005) speculated that this challenge is magnified in the public sector because in many respects the services provided are more complex and because there are fewer staff to deliver them. The emphasis on call handling time targets could lead to standardization, limit the use of agent expertise, and negatively affect service quality. This may cause role conflict in agents who have chosen to work in the public service to help others, particularly those working in centres dealing with complex social and/or legal issues where professional expertise, accuracy, empathy and emotional labour are required. Russell's (2009) survey of Australian call centre workers that included items on organisational identity, found it was centres providing a public service that featured at the upper end of the organisational identity index. He speculated that workers might identify with services with a high, positive social value. Russell cautioned against public services emulating private sector practices because this may lead to diminished employee good will and increase turnover. Copas (2004) noted the difficulties corporatizing public services had for employees dedicated to helping people, illustrating that the principles of social justice and equity, customer satisfaction and business efficiency do not make easy bedfellows.

The URCOT (2000) study noted that some public sector agents reported more management emphasis on providing accurate information compared to achieving throughput targets. Copas (2004) reported that employees were expected to handle benefit calls in an average of two minutes and 45 seconds and achieve a standard of 95% accuracy in all processing. The emphasis on accuracy in public sector call centres is likely due to the serious consequences on the public of decisions made by public servants and because decisions are open to broader stakeholder examination than in the private sector (Dillon et al., 2010). Accuracy may also be prioritised because of the need to be seen to be in control of service quality in the face of parliamentary and media scrutiny should problems occur (Burgess et al., 2005). Anderson et al.'s (2006) study found

agents trying to meet the objectives of customer service and cost-efficiency as well as a third priority, namely information accuracy. The agents in one call centre experienced these priorities as shifting, conflicting, and contradictory. In the other, agents were clear the primary focus was on providing accurate information. The transparent performance the call centre model offers meant the manager felt more accountable for results compared with other sections of the organisation and under pressure to match call centre industry standards in terms of voice readiness, which is a measure of productivity. So while information accuracy (quality) was paramount on the call centre floor, the manager's performance was assessed using quantitative criteria.

While the subject of the case study was not a public service call centre Ellway's (2014) examination of call quantity-quality is instructive because it revealed that while the traditional conceptualisation of quality-quantity as a trade off was accurate at the individual agent level, at the broader unit of analysis quality-quantity may not operate as such in the long term. Therefore it is likely to benefit centres if a longer-term view of each call is adopted so that there is emphasis on the accurate and effective resolution of each enquiry. This will reap returns for efficiency because it will reduce the amount of time spent on the one enquiry by multiple agents as it is geared to preventing rework. He recommends relaxing quantitative targets at the individual agent level. Russell (2009) investigated work-manageability in 20 call centres. Of the five centres where agents found their workload highly manageable, four were public sector centres. This result was ascribed to less of a focus on individual quantitative targets than on collective performance due to the diverse call types ranging from the simple to highly complex. Regardless data on call handling time of individual agents was kept. The combination of forces acting on public sector call centre employees is considerable and indicates that flexibility, resilience and resourcefulness are required in call centre work.

## **2.9 Call centre work in New Zealand.**

Many New Zealand Government Departments and local councils use call centres (Hunt, 2004b; Hunt & Rasmussen, 2010; Hunt, Rasmussen, & Lamm, 2010). New Zealand studies on the psychological effects of call centre work are few and reach conflicting conclusions (Hunt & Rasmussen, 2010) although many of their findings reflect international research. Day's (2002) study of two Dunedin call centres indicated that New Zealand employees do not experience the same level of stress found in much of the literature and she attributed this in part to the convivial nature of the work environment. Day found that agents rated their interactions with callers as the factor they most liked about their job confirming the findings of Frenkel et al. (1998, 1999). In their study of two New Zealand retail bank call centres Sayers, Page, Barney, and Naidoo (2003) found the camaraderie of employees and friendly managers outweighed the negatives of the physical environment. Emotional support from colleagues and supervisors mitigated the effects of dealing with difficult calls. Employees commented negatively about having to meet sales targets and suggested the monitoring via surveillance indicated a lack of trust. Sayers et al. (2003) found in general high levels of job satisfaction and long-term commitment to the employers.

Copas's (2004) study conveyed the difficulties of maintaining a work-life balance in a public service call centre. She also identified that the employees formed strong relationships. Copas (2004) found that agents considered productivity requirements compromised call quality, wrap-up quality and staff welfare. She reported employees' frustrations that they were caught between impossible demands and that genuine customer care was not identified by any performance measures. Hannif and Lamm (2004, 2005) considered employees' health and safety in two private call centres might be at risk due to tasks performed and limited occupational health and safety policies and practices. Boyte's (2009) survey of call centre managers identified that participants considered the level of statistical monitoring and measurement of performance excessive. She noted the empirical evidence suggested the number and type of performance measures used should be reduced and this would be likely to increase well-being.

New Zealand case study research of 32 female call centre workers who had experienced career progression and a survey of 60 female entry-level workers in six different sectors found work satisfaction and career benefits (Hunt, 2004a, 2004b, 2005, 2008; Hunt & Rasmussen, 2006, 2007, 2010; Hunt, Rasmussen, & Lamm, 2006). It is acknowledged there is the possibility of bias given the same person authored these studies. Day (2002) indicated that predominantly female employees acquired customer service, computer and teamwork skills that could be used in many other jobs.

Boyte (2009) found the mass production model was dominant in New Zealand with little effort made to increase the autonomy or work discretion of employees. There were efforts to increase staff involvement through communication forums, and to introduce high involvement practices management practices by way of task variety. As indicators of employee stress and dissatisfaction Boyte (2009) estimated that turnover and absenteeism cost the New Zealand call centre industry NZ\$123m per annum.

## **2.10 Outcomes for organisations.**

Taylorised jobs demotivate employees and lead to higher turnover (Dalton & Todor, 1979) and turnover has important outcomes for organisations (Batt & Colvin, 2011; Holman et al., 2007). While estimates vary across countries and organisations, Holman et al.'s (2007) global survey of centre managers found that the typical centre reports a total turnover rate of 20% per annum. Holman et al. (2007) estimated that the combined cost of recruitment, training and lost productivity of replacing one worker is the equivalent of between three and four months of a typical worker's pay. There is no doubt the costs of turnover are high given that labour represents typically 70% of total operating costs in liberal and co-ordinated economies and 57% in developing countries (Holman et al., 2007). Lack of attention to the well-being of agents also costs centres by way of a depersonalized approach to customers (Deery et al., 2002; Holman, 2002).

Boyte (2009) reported that 70% of participant call centre managers in her New Zealand study had limited knowledge of the recommendations from the academic research on the impact of

management practices and job design on call centre employees. Knights and McCabe (1998) pointed to the no-win situation created by management emphasising quantity while at the same time minimising staff numbers yet still demanding quality customer service. They urged management to heed their account not only because unacceptable levels of stress are inhumane, but they also counter efforts to achieve quality and bottom line results. A failure to address harmful workplace stress is also contrary to health and safety legislation in many countries. Taylor et al. (2003) concluded the high incidence of ill-health in the centre they studied was attributable to the speed of the technology used, performance target pressures, and the emotionally draining work within an environment that was unsatisfactorily heated and ventilated. The employer was unwilling to tackle the social environmental problems and performance targets due to highly competitive market conditions. Holman (2003) questioned whether the aim of achieving employee well-being and call centre performance was realistic given the tight profit margins of the market served by “mass service” call centres and the subsequent cost-cutting on labour. The indications are that some employers are not aware of or are not persuaded by the research recommendations from the call centre literature even though the indications are it would prove profitable for them to do so. It could be argued that the ethos of managerialism that focuses on short-term objectives (Hough, 1995) and implies a lack of trust in workers, continues to prove a barrier to providing jobs that have positive effects on worker well-being and offer healthy work environments.

### **2.11 Customer experiences of call centres.**

There is a dearth of research on the experience of call centre customers (Bolton & Houlihan, 2005). Call centres benefit customers by offering services unlimited by distance and faster service than would be possible via face-to-face interactions because calls are usually routed to the next available agent (Bennington, Cummane, & Conn, 2000). Call centre agents can usually deal with any customer due to the centralised storage of information (Houlihan, 2001). It is claimed that service consistency and quality are increased because call centres provide centralised services so



these can be monitored and measured (Korczynski 2002, 2003; Russell, 2009). Some call centres offer interpreters thereby facilitating access to services for those without the language of the host country (Bennington et al., 2000).

Although customers may concur about what constitutes good service in general terms, individual perspectives of good service will often vary according to the particular industry, organisation and occupation providing the service and the customers' needs (Ashforth & Humphrey, 1993). Furthermore societal norms about what constitutes good service vary across cultures (Ashforth & Humphrey, 1993). For these reasons the expectations of good service that establishing a call centre creates, may not be fulfilled. Customer complaints about poor service from call centres have been widespread (Batt et al., 2009). The drawbacks include lower service quality as mechanised systems such as interactive voice response limit callers' choices (Batt & Moynihan, 2002). Scripts and routinizing service work also means that options for customers are standardized and interactions are structured (Batt, 2000). Technology can fail and 'waits' can seem much longer when there are no visual cues, particularly if the customer is anxious (Bennington et al., 2000). Customers unfamiliar with contemporary communication technology may not have the confidence to negotiate the telephone system and call centre technologies might not be well accepted in some cultures (Bennington et al., 2000).

Walker and Craig-Lees (1998) identified services in which technologically-assisted transactions could attract negativity including situations where there is high importance placed on personal contact, a high degree of personal attention is needed, and risk is perceived to be reduced by direct personal contact. Bennington et al.'s (2000) customer focus group study of an Australian public service centre, working in human services, found a statistically significant difference in satisfaction levels with call centre services and office-based services, with the latter rated higher.

A common issue is the frustration of repeating a request or complaint to a new agent every time one calls (Sayers et al., 2003). In Gilmore's (2001) case study agents identified that many customers called the call centre again when they felt their call was rushed or they did not

understand the information given. Copas's (2004) ethnographic study of the New Zealand Department of Work and Income's Call Centre, mentioned callers complained about the emotional and mental pressure associated with repeating their circumstances to different employees.

Bolton and Houlihan's study (2005) contained accounts from call centre customers. They recast the call centre customer as an active social actor caught between and assuming "at any given moment and over time" three socially produced roles, namely mythical sovereign, functional transactant and moral agent (p. 687). Aggressive marketing has created high expectations of service however the stronger emphasis on meeting throughput requirements rather than quality service conflates and confuses these objectives and gives the sovereign customer a mythical status. Customers may be acutely aware of their supposed sovereign status, express high expectations of quality service and can be quick to complain if this is not provided. On the other hand the array of instructions callers have to follow to access the required service gives customers clear signals of the mythical nature of their sovereignty. The functional transactant describes the caller who is aware of contrived service interactions and seeks only quick, efficient, straightforward and polite service. The agent performs routinized, scripted customer service allowing them to remain emotionally distanced from the caller. The term moral agent casts the customer and the call centre agent as human beings with agency and their interaction becomes a social and moral one. While they have little control over the structure of their interactions they can choose how they relate to one another – whether to help and connect, whether to observe social niceties.

Burgers, de Ruyter, Keen, and Streukens (2000) identified customer expectations of agents, namely adaptiveness (agent is expected to adjust their behaviour including their communication level to the customer, the situation and be able to help), assurance (agent must provide clear information to comfort the customers and assure them of confidentiality), empathy (agent must empathize with customer's emotions and situation so they do not feel like they are just a number) and authority (agent is expected to have the authority to deal with questions and problems). Customers have high expectations of agents.

## **2.12 Conclusion.**

The literature review indicates the enduring employment of the call centre model. In commercial call centres the research describes the numerous contradictions both managers and employees frequently attempt to balance day-to-day, emanating from the oft-competing priorities of customisation and cost-efficiency. The distinct labour process has attracted criticism for its electronic pervasiveness and control and an assembly-like approach to service interactions with its associations of de-skilling together with an overall sense that employees are not trusted to get on with their work. Alternative perspectives emphasize the autonomy of individual workers and their genuine desire to help customers and observe that service interactions can only be prescribed to a degree given the need to customise within a competitive global market (Frenkel et al., 1998). Given these requirements it was predicted that call centre work would require the skills of semi-professionals. Certainly more complex work and accompanying discretion was reported when staff served 'high-value' customers (Batt, 2000). Many researchers concluded the designation of call centre work as unskilled was incorrect, even in the less complex call centre jobs. In its migration to delivering professional services this organisational design, usually intent on standardising interactions to lower costs, was pitted against the force of professional staff with their high career capital, strong occupational identities, and ethical and legal obligations (Collin-Jacques & Smith, 2005). It was argued that the extent of the skills and discretion these professionals exercised and the quality of their work life depended in part on the market for their skills, the influence their profession had on occupational formation and their authority over their profession, and their involvement in designing the call centre technology (Collin-Jacques & Smith, 2005). Call centres also provide non-professional, but undoubtedly complex government services that require skill to deliver. Copas's (2004) study invites consideration of how public service work is experienced when employees attempt to help callers in the face of performance measures and organisational protocols. Anderson et al. (2006) found accuracy was a priority alongside cost-efficiency and customer orientation. Added to call centre interactions are the expectations of both employees and callers,

both with considerable exposure to the culture of commercial call centres that try to sustain the myth of customer sovereignty. Individuals in both these groups may also have firm ideas about what constitutes public service. The literature is sparse on customer expectations and their satisfaction with this mode of service delivery (Paulet, 2004). Due to the critical matters some public service call centres deal in individuals may seek the assistance of experts to support and/or represent them in their interactions. Call centre work appears to make considerable demands on public servants given they have to provide accurate information quickly yet empathetically and convey the impression of customer-orientation. They must also cope with their callers' emotions and their own feelings as well as their desire to help people. Findings support Hochschild's belief that the more control the employee has over the conditions of their work, the less harm is occasioned by their emotional labour.

The current project was aimed at investigating the experiences of those who request, receive and provide information on immigration matters via the Immigration New Zealand Contact Centre, a public sector contact centre. A focus was the predicament of the ICC's customer service officers charged with maintaining a customer-centric environment while offering information on immigration policy that will often prove migration aspirations cannot be realized. Another likely point of tension was the interaction between the customer service officers and those expert callers acting on behalf of visa applicants, namely immigrant representatives who are often engaged when customers experience or anticipate problems. This chapter has located the fundamental tension in the remit of the ICC within wider tensions experienced in call centres and identified the lack of a comprehensive customer narrative in call centre research. The themes and categories identified should prove useful reference points for exploring the experiences of expert callers to and staff working in the ICC coping with the considerable pressures concentrated in this interface.

## Chapter 3: Methodology

### 3. Introduction.

This study is an exploratory project investigating the expectations and experiences of staff and users of the Government's Immigration New Zealand Contact Centre (ICC). The intention was to examine whether there are incompatible expectations between visa applicants and their representatives, and customer service officers (CSOs) and whether this affects the experiences of callers and employees of this organisation. The initial aim was arrived at through an interactive process between the researcher, academic supervisor and some of the stakeholders, namely ICC management and immigrant representatives (IRs). This interaction identified a further purpose for the research, of possible interest to Immigration New Zealand (INZ), that is, to serve as a pilot for a survey of the reasons people contact the ICC. It was proposed by the academic supervisor that the study could generate ideas, themes and categories for use in a survey.

The research took place in 2011 and 2012. Eleven IRs and 10 CSOs were interviewed. Nine CSOs also completed work diaries for five days. I also observed CSOs at work in the ICC in Auckland for four days. This included listening in while a CSO answered calls from the general public and to CSOs consulting a senior CSO about matters arising from calls they were taking. I also talked with the ICC manager, who described his management approach, the culture the leadership team was attempting to develop for the ICC, human resource matters, the demanding nature of the work, performance objectives, and the Centre's resources and plans for the ICC.

To appreciate how immigrant representative callers to and customer service officers working in the ICC understand, interpret and organise their interactions, qualitative research seemed appropriate because it allows a focus on the particularities of the local and on a 'thick description' of human interactions (Agee, 2009). Paulet (2004) noted there was little research on call centre customers and their expectations and level of satisfaction and cited only four studies. Bolton and Houlihan (2005) noted there was little critical analysis with the customer as the focus.

A search in November 2014 of PsycINFO for studies since 2004 that included observing, surveying or interviewing call centre customers, produced 16 results and of those none involved interviews with customers. The same search of Web of Science (Arts and Humanities and Social Sciences) produced seven studies one of which involved discussions with customers in focus groups. The bulk of the research is about on call centre employees and there appear to be few, if any, studies involving semi-structured interviews with a call centre's expert customers. In qualitative inquiry the researcher explores situations about which little may be known (Royse, 2004). Given this is a relatively new area for research it was decided that qualitative research was an appropriate methodology. It permitted an understanding of the challenges faced by both CSOs and callers to the ICC from their perspectives (Hupcey, 2010).

### **3.1 Research setting.**

The Ministry of Business, Innovation and Employment (MBIE) was formed on 1 July 2012, bringing four government agencies into one ministry including the Department of Labour, in which Immigration New Zealand (INZ) is situated. INZ's role includes: attracting skilled migrants and matching these with employer needs; deciding visa applications; controlling people movement at the border; supporting migrant settlement and retention; implementing the refugee quota programme; and ensuring compliance with immigration law and policy (MBIE, 2015a). INZ comprises both onshore and offshore branches. New Zealand branches include the ICC in Auckland and a call centre in Palmerston North that was opened in September 2013.

#### **3.1.1 Immigration New Zealand's Contact Centre.**

The INZ Contact Centre in Auckland was established in 1998 and serves INZ's global customers. As "the 'voice' of Immigration New Zealand" the ICC contributes to INZ's purpose of attracting quality migrants by providing "valuable information and advice to people wishing to visit, study, work or live in New Zealand" (MBIE, 2014c). The ICC provides information to the public

about matters ranging from visitor visas to lodging an application for refugee status. Clients include individuals and their representatives, internal branches of INZ, other government departments, employers and health boards. In October 2010 a free phone number was introduced for licensed immigration advisers, lawyers and others who are exempt under the Immigration Advisers Licensing Act (2007) from the requirement to have a licence to provide advice. Other exempt people include staff of citizens' advice bureaux, community law centres, and MPs and their staff.

While INZ encourages enquirers to explore its website and to use the online knowledge base for information, it is to the ICC those who want information on immigration matters are guided. After a resident visa application is lodged, applicants continue to be directed to the ICC until a case officer is allocated. Allocation of a case officer can take up to six months for Skilled Migrant category applications (MBIE, 2015c). Work visa applicants can be asked to contact the ICC with enquiries even after their application has been allocated to a case officer. Visa applications attract an Immigration New Zealand lodging fee. Applications for visitor, work and student visas can take 25 or more days to process and while applicants might know who their case officer is and receive texts about their applications, they are still directed to the ICC if they want to talk about their application (MBIE, 2015b).

INZ's Contact Centre in Auckland's central business district receives domestic and international telephone, online and email enquiries 24 hours a day, seven days a week (MBIE, 2015d). At the time of the research the ICC was open five days per week from 7am to 7pm. There were between 70 and 80 customer service officers (CSOs) in six teams, one team of trainees and four 'voice' teams that took calls from the public, and a sixth team, namely the business-to-business team. The latter focused on services provided to licensed advisers, lawyers, others who are exempt from the requirement to hold a licence, employers and district health boards. It also handled all online enquiries from customers. The other teams dealt with any overflow calls from the business-to-business team. The ICC also received 100-150 emails per day (Department of Labour, 2008). A Language Line (interpreters) provided by the Government is available.

CSOs are warranted immigration officers, but do not usually process or decide visa applications. There were six immigration managers responsible for the teams and they reported to the ICC manager. The immigration managers were consulted when callers asked to complain to a manager. There were 12 senior CSOs and two developing seniors CSOs. Senior CSOs assisted CSOs with answers to complex enquiries. There were at least two senior CSOs on duty (from 8am to 6pm) for each of the six rotating shifts (7am-3pm, 8am-4pm, 8.30am-4.30pm, 9am-5pm, 10am-6pm, 11am-7pm). Other positions within the ICC included workforce planner, training officer, nine systems thinkers and back up systems thinkers. Aside from the systems thinkers the latter roles did not involve direct interaction with users.

### **3.1.2 Immigration Contact Centre management.**

The ICC manager had worked at the centre for two years by late 2011. He described the former management style as one of “command and control”, which emphasised attaining call throughput targets. The current leadership model focused on partnership with and empowering staff. According to the manager this change had seen an increase in employee satisfaction, performance, discretionary effort and attendance within the ICC. On commencing employment, the ICC manager relieved the pressure on the CSOs by removing the focus on statistical measures of performance to allow them to focus solely on quality. Despite opposition from some colleagues, he had insisted on following through assuring them the benefits would show eventually in less calls and less waiting time.

The ICC manager reported that he introduced new statistical targets in 2011 such as to reduce ‘wait time’ by 65% and the measures showed considerable improvements as a result of the emphasis on quality. For example, caller wait times had reduced from over 10 minutes in December 2010 to one minute and 50 seconds by December 2011. At the same time the manager worked with the leadership team to create a safe, respectful environment where efforts and achievement were rewarded. In various places in the ICC room there were four posters that conveyed the desired



culture. These were headed Customer (helpful, fair, proactive, attentive, present, focussed, respect, empathy, go the extra mile), Team (communication, consultation, positive attitude, connectedness, support, development, growth, receptive to change), Systems (system thinkers, share and act on feedback, solutions focused, model employer, build and share knowledge) and Environment (respect, inspire, safe, fun, empower, take pride, embrace diversity, celebrate success, workplace well-being). These terms featured in the manager's description of the ICC and in interviews with the CSOs. They are also contained in various ICC documents associated with CSO performance.

### **3.1.3 CSOs.**

Most ICC CSOs were aged between 20 and 35 years. There were an even number of males and females and the average tenure was 18 months. The CSO salary ranges from \$35,406 to \$53,109 pa. The salary for immigration officers in the other branches of INZ ranges from \$40,000 to \$88,000 pa (Careers NZ, 2014b).

According to the ICC manager each CSO answered approximately 80 calls a day. The manager said half of the calls could be of high emotional content. He commented that in low emotional call centre work there is shrinkage (unplanned absences) of 10%. Shrinkage increases at the high end of the range of emotional call centre work such as in emergency centres and can reach 35% for the ICC. CSOs communicate by telephone and online with English and non-English speakers from all over the world and must be able to explain the application of immigration law, policy and procedures to individual situations so callers understand. Immigration officers processing visa applications often specialise in one aspect of policy at a time (Controller and Auditor-General, 2009). There was no policy specialization in the ICC. The knowledge required of the CSOs is substantial. CSOs also communicate with migrants' representatives and their New Zealand contacts as well as other Government Departments and agencies onshore and offshore.

### **3.1.4 ICC and CSO performance.**

The ICC's strategy for 2011/2012 was to reduce average customer wait times to below 1 minute by 30 June 2012 while maintaining a strong emphasis on quality and one call resolution (Department of Labour, 2011b). The key statistic is "voice ready" according to the ICC manager. It is the percentage of time during a given period that the CSO is either active on a call, or available to take calls. The aim for the ICC in 2011/2012 was to increase the "voice ready" statistic from 63% to 73%. By December 2011 the voice ready average in the ICC was 65%. CSOs are expected to strive to achieve 70-76 per cent voice readiness (tracked monthly). For the Voice teams, the expectation is that *average call handling* time will fall within the range of *5:30-8:00 minutes* (tracked monthly) and for the business-to-business team between *7:00-10:00 minutes* (tracked monthly).

CSOs are required to pass a test to become warranted immigration officers. CSOs must adhere to a code of conduct and strive to achieve demanding quality and productivity performance objectives. Individual performance in line with objectives is assessed at least 12 times each year.

### **3.1.5 Immigration representatives.**

Immigrant representative callers to the ICC were the other group studied. These included those whose positions (paid or voluntary) within specific social/public service organisations allow them to provide immigration advice under the Immigration Advisers Licensing Act (2007) as well as people in the private sector who provide immigration advice and assistance for profit, namely lawyers and licensed immigration advisers (Immigration Advisers Authority, 2014c). There were 668 licensed advisers in 2014 (Martin, Jenkins, & Associates Limited, 2014). Immigrant representatives can offer assistance with any immigration matters provided they have the expertise. Some focus on straightforward matters while others specialise in providing complex advice (such as business proposals, reviews and appeals, refugee status applications) and some provide services over the entire gamut of immigration matters. Immigrant representatives can serve as intermediaries

between prospective migrants and INZ, and advise applicants' family sponsors, educational providers and employers. They can also provide settlement assistance.

Strained relations between INZ and private sector representatives were identified in Lovelock and Trlin's (2000) survey of the immigration industry. Some INZ staff considered service provision by the private sector "distasteful" (Lovelock & Trlin, 2000, p. 35). Only 57.7% of survey respondents in the immigration industry rated their relationship with INZ as positive (Lovelock & Trlin, 2000). Of those organisations reporting difficulties with immigration policy, 82.3% reported difficulty with the way applications were processed by INZ (Lovelock & Trlin, 2000). At that time there was no regulation of the industry. With the implementation of the Immigration Advisers Licensing Act (2007) there are institutional signs that INZ has accepted immigration representatives (for example, visa application forms provide for representative's contact details; case officers write to applicants care of their nominated representatives rather than direct to the applicant).

In 2005 the Department of Labour reported that there were complaints to the Minister of Immigration, the department and industry associations about immigration consultants. A licensing regime, requiring immigration advisers to meet competency standards and to comply with a code of conduct was recommended to enhance service provision (MBIE, 2014d). The Immigration Advisers Licensing Act was passed on 4 May 2007 and onshore licensing became mandatory from May 2009, with offshore licensing following from May 2010 (Department of Labour, 2009). The Immigration Advisers Authority oversees licencing and its mandate includes ensuring adviser compliance (Department of Labour, 2009). Many licensed advisers were in business prior to the implementation of the Immigration Advisers Licensing Act (2007). Historical tensions between them and INZ form part of the backdrop to the interaction between immigrant representatives and CSOs.

Lawyers representing immigration clients are accountable to the Law Society for their conduct and must hold a practising certificate that is renewed annually. Immigrant representatives

who are Citizens Advice Bureaux staff and staff of Community Law Centres must also adhere to performance standards, as must the staff of New Zealand Members of Parliament.

### 3.2 Participant details.

I restricted the participants to 21 people. Limiting the number of participants allows the researcher to obtain rich contextual data necessary for facilitating research of an exploratory and descriptive nature (Hannif, Burgess, & Connell, 2008). A purposive sampling method (Silverman, 2010) was used. Participants comprised two groups. The first group were ‘immigrant representatives’ (IRs) who provide immigration information and/or advice. The participants had a range of expertise in immigration. The immigrant representatives’ demographics and tenure in the immigration industry are reported in Table 1.

**Table 1**

***Immigration Representatives’ (IRs’) Demographics (n=11)***

Gender	Tenure (years)	Type of IR
Male	7	Licensed Immigration Advisor (LIA)
Female	10	LIA
Male	14	LIA
Male	24	LIA
Male	24	LIA
Female	20	Support to a LIA
Male	4	Community Law Centre staff member
Female	8	Citizens Advice Bureaux staff member
Female	5	Settlement Support Co-ordinator
Male	11	Solicitor
Female	7	Electorate Secretary to a Member of Parliament

The second group consisted of 10 customer service officers (CSOs) at the Immigration New Zealand Contact Centre (ICC) in Auckland. Each of the ICC's teams of CSOs was represented. The CSOs' demographics and tenure as CSOs are reported in Table 2.

Participant recruitment occurred over one year. Following Immigration New Zealand's agreement to the research I approached a selection of immigrant representatives. Without prompting several people nominated other potential participants. CSOs were contacted through the manager of the ICC call centre. The manager was asked to inform the call centre staff of the study and invite them to participate. At this stage, it was made clear that there was no obligation to participate in the research. I then contacted staff members who expressed interest in the study by email and personally invited them to participate in the study. The final group of CSOs were chosen to provide a cross-section of CSOs from all teams and of varying tenure and gender.

**Table 2**

*Customer Service Officers' (CSOs') Demographics (n=10)*

Gender	Tenure (years)	Type of CSOs
Female	Less than 1	Trainee
Male	Less than 1	Trainee
Male	Less than 1	Written, Business to Business
Female	10	Written, Business to Business
Male	3	Voice teams
Female	3	Voice teams
Male	Less than 1	Voice teams
Female	Less than 1	Voice teams
Female	Less than 1	Voice teams
Female	1	Voice teams

### **3.3 Research design and measures.**

A mixed-methods design was employed. The measures used to collect data about the experiences of the CSOs comprised semi-structured interviews, daily diaries and informal observation. Diaries were employed so that CSOs reported on what had happened during their day. Data from informal observation was collected during four days in the ICC. Informal observation of CSOs enabled more background knowledge of the organisational context to be gathered. It allowed proximity to the unique features of the participants' work and how they perceive it and revealed more about how the work is done (Turner, 1983). People sometimes reveal their priorities through behaviour and not words. Observation identified matters that invited further exploration and was used to frame interview questions. Information about the ICC was provided during and after the period of interviewing and observing.

Semi-structured interviews were utilized to obtain the immigrant representatives' data. All the interview recordings were stored on a password-protected computer within a lockable office, as was the hard data. At the end of five years the data will be destroyed except for the thesis.

#### **3.3.1 Semi-structured interviews.**

All interviews were guided by a semi-structured format. Firstly, I sent the immigration representatives a list of possible questions so they could begin thinking about them before the interview. The questions are attached as Appendix A.

I then developed a list of interview topics and possible questions for the CSOs, which included questions prompted by the information provided by the immigrant representatives. The CSOs were sent an outline of the interview topics prior to their interviews (see below under Procedure). As the interviews progressed, I added some questions generated by my observations during four days in the Auckland Contact Centre. The topics and initial interview questions comprise Appendices B and C.

### **3.3.2 Diaries.**

The CSOs were asked to keep a daily diary of calls over five days to provide background information to the interviews. The CSOs were emailed a diary form that provided for a break down of the questions, issues and situations that staff found most difficult to deal with and about the rewards of their work and what went well (Appendix D).

### **3.3.3 Informal observation.**

Informal direct observation of CSOs managing calls, behaviour between calls and interactions with colleagues, was conducted to enable more background knowledge of the organisational context to be gathered. I constructed an Observation Recording Sheet (Appendix E) based suggestions from Silverman (2010) and Whitehead (2006). Informal observation included listening to a CSO taking calls and observing CSOs consulting a Senior CSO about their calls.

### **3.3.4 Documents.**

Documents inspected included those produced by or for the ICC (including the ICC Mission MS-PowerPoint, ICC Culture MS-PowerPoint, ICC Leadership Charter, Quality Processes and derivative documents including Call Observation template, Data Integrity template, templates for measuring the quality of emails and other written work, the CSO Staff Performance Plan (Appendix F), Value and Failure Demand Manual, screen shot of the ICC Information Manager). Other documents inspected were from INZ as a group and the Department of Labour (now part of MBIE), appeal bodies and other organisations such as the Immigration Advisers Authority, Ombudsmen's Office, Auditor General's Office, the State Services Commission and the PSA.

### **3.4 Ethical issues.**

Prior to commencing research I received Notification of Low Risk Research/Evaluation Involving Human Participants and Acknowledgement from the Massey University Human Ethics

Committee. Potential participants were sent an Information Sheet describing the study and the ethical and confidentiality details (Appendices G and H) and a Participant Consent Form (Appendix I). I provided the interview transcripts to the 10 participants who requested them and asked them to mark clearly on the transcript anything they would prefer not to be used. One person made some minor amendments to their transcript. I offered the interview recording to those who had initially requested them, but they all decided they did not want these.

I protected participants' confidentiality in several ways. I transcribed all the interviews myself and gave participants pseudonyms in the interview transcripts and in the write-up. I also edited out identifying details and potentially sensitive information from the interview transcripts and from the data gathered from diaries and informal observation.

### **3.5 Procedure.**

#### **3.5.1 Interviews.**

An email was sent to the immigrant representatives. This was accompanied by an Information Sheet describing the study, Notification of Low Risk Research/Evaluation Involving Human Participants and Acknowledgement from the Massey University Research Office, a Participant Consent Form and list of possible interview questions so they had time to prepare for the interview. I received written consent from all 11 immigrant representatives to participate in interviews and having these recorded and transcribed.

I interviewed the immigration representatives first to ascertain their experiences in their interactions with the Immigration Contact Centre so that I could approach the CSOs with some of the information gathered from the representatives. There were telephone interviews with 10 participants because the participants were located in various parts of the country from Invercargill to Auckland. There was one face-to-face interview held in my office with an immigrant representative who worked nearby. The interviews occurred from July to October 2011. The interviews lasted between 40 to 60 minutes.



I followed the same pre-interview procedure for the CSOs, but provided an outline of interview topics instead of a list of questions. The reason for this was that in addition to wanting the CSOs to be prepared for the interviews, I was conscious of my current role as a licenced immigration adviser and I did not wish to present them with a long list of questions. I wanted them to feel at ease as much as possible. I received written consent from all the CSOs to participate in interviews and to having these recorded and transcribed.

The CSO data were collected in the Auckland Contact Centre from 6-9 December 2011. Interviews were conducted during the week the keeping of the diaries commenced so I could prompt participants and was on hand to collect as many diaries as possible. CSOs were interviewed individually and interviews ran for between 50 to 80 minutes. The interviews were conducted in a closed room outside the operations area to encourage the CSOs to speak freely (Mulholland, 2002).

Open questions led the topics and kept the interviews on track. The interviews were conversational in style and I encouraged the interviewees to speak about what was important to them. I followed up matters they raised that seemed relevant to the research topics. I believe my occupation as a licensed adviser and former position within INZ enabled me to create rapport with both the IRs and CSOs. I understood most of the immigration terminology, was familiar with longstanding immigration issues, the various staff positions and branches within INZ and shared the experiences of those calling the ICC. Having conducted the first two CSO interviews that seemed to go well, I introduced one or two comments from the immigrant representatives cautiously in the remaining eight interviews. As the interviews progressed and I gained more knowledge about the CSOs and their experiences, I used the information to raise more questions related to the research topics such as employing my knowledge about first call resolution and productivity requirements to ask whether these could cause difficulties for the CSOs.

All participants gave permission to consult them later to clarify any matters post interview. Clarification was sought from three CSOs. All interviews were recorded (to allow full attention to

the individual), using an iPhone and transcribed and analysed as soon as possible (Pidgeon & Henwood, 1997).

### **3.5.2 Diaries.**

Nine of the 10 CSOs kept diaries about their experiences taking calls over five days. I emailed a reminder to each participant to begin their diary during the week the interviews took place. During the interviews I reminded each CSO of the request that they keep a diary and I was able to answer questions some of them had. Seven of the CSOs gave some of their diaries to me on my last day in the Immigration Contact Centre. I received the remaining diaries by email soon after. Forty-four diaries out of 50 possible diaries were returned.

### **3.5.3 Informal observation.**

I had the opportunity to informally observe CSOs receiving calls over the four days. On the first day the ICC manager spoke with me for 90 minutes. He also showed me around the call centre. He directed my attention to the amenities, the ICC award notices and “wall of fame” board with messages from customers complimenting CSOs for their good work as well as four panels repeated around the walls that displayed the desired culture of the centre, customer, team, systems and environment. The ICC manager introduced me to staff members. He then offered, and I accepted, the opportunity to listen in on calls handled by a newly trained CSO for 80 minutes. I took notes of the nine calls I heard.

To conduct the interviews I was based in the “Quiet Room” that fronted on to the call centre floor. From here I could observe the call centre staff in action. I was permitted to walk about the call centre and use the facilities. Field notes of key issues were written up shortly after my visit so as not to lose detail (Martin & Turner, 1986).

On my last day in the ICC, with the ICC manager’s permission, I closely observed a senior CSO dealing with requests for assistance with calls from CSOs. The observation lasted 80 minutes.

The senior CSO described their background, their role, their delegated authority, their tasks and their communication style. I was shown the screen view the senior CSO had of the work of the CSOs, via software called Information Manager. This showed CSOs taking calls or performing after call work or those who were “idle”. The CSOs then began to consult the senior CSO. They rose from their stations and walked to his desk to speak with him. My field notes indicate 10 consultations took place.

### **3.6 Data analysis.**

Thematic analysis was used to analyse the data (Braun & Clarke, 2006). Thematic analysis is recommended as a form of analysis that is accessible to those new to qualitative research (Braun & Clarke, 2006). I aimed for a rich description of the data set because Braun and Clarke (2006) signalled this was useful when researching with participants whose views are not known. In this case it was the views of the expert callers and the call centre employees that was sought. I have used an inductive approach so the themes are closely linked to the data. The themes were identified at a semantic level (Braun & Clarke, 2006). Thematic analysis was conducted within a realist/essentialist paradigm. For this reason I was able to theorize emotions and experience and meaning in a straightforward way given the premise that language reflects and enables us to articulate meaning and experience (Braun & Clarke, 2006). I searched across the data set to identify repeated patterns of meaning (Braun & Clarke, 2006).

I transcribed all interviews to familiarize myself with the data and to learn the participants’ language and meanings. In transcribing the interviews I produced a verbatim account of the verbal utterances (Braun & Clarke, 2006). I was scrupulous in transcribing the entire interview because this process was new to me and I was concerned not to miss any important matters and to ensure tight coherence with the recordings. Because I was interested only in key themes I did not opt for a detailed transcription method. Thematic analysis does not require the type of detailed transcription method that conversation or discourse analysis demands (Braun & Clarke, 2006). I tidied the

quotes from the customer service officers and immigrant representatives to make them easier to read.

I read each transcript multiple times to ensure I was familiar with each account. I then examined each transcript individually to identify interesting aspects and the main themes for that interviewee bearing in mind the overall research question (Braun & Clarke, 2006). I identified between five and nine themes per interview. I took care to ensure a connection between the participants' views and responses to questions and the themes I identified by re-reading the transcripts to ensure correspondence. Conscious of a secondary purpose of the research to serve as a pilot for a survey of the reasons people contact the ICC, I also identified and grouped the immigrant representatives' answers to questions around that topic as well as about the expectations immigrant representatives said they and their clients had of CSOs and about how the ICC's service could be improved. I did the same for the CSOs collating their views on reasons why people call the ICC, the callers' expectations, about how the ICC could improve its service and how immigrant representatives could improve their interaction with CSOs.

I compared the main themes from each interview with those identified in the other interviews and in regard to the immigrant representatives I arrived at 17 themes. Further engagement with the transcripts resulted six themes. Eleven themes were judged subordinate and were subsumed into other themes.

Six or more interviewees articulated each of these themes. The key themes encapsulate the complexity and significance of the information sought from and provided by the ICC, the benefits to migrants of having access to immigration expertise, the problems caused by the provision of inconsistent information, the behavioural consequences of inconsistent information with persistent calls to the ICC, and a solution that immigrant representatives had found.

For the CSOs interviews I arrived at 16 themes initially. Once again themes were subsumed into other themes leaving seven. Five or more interviewees articulated each key theme.

I looked at the ICC observational data and CSO diary data separately. I identified between six and eight themes for each type of observation, namely observation of the whole call centre in action, the consultations between CSOs and a senior CSO and listening in on a CSO taking calls. I compared themes for each type of observation and arrived at 12 themes, which I reduced to 10 key themes by collapsing two themes into one and subsuming one theme under another. I followed the same process with the diary data and identified between seven and 11 themes for each set of diaries. I then compared the main themes from each diary with those identified in the other diaries and arrived at 12. I reduced these to seven key themes.

The next stage involved checking for common themes across the data set for the CSOs. I checked whether the themes developed from observation and the diaries confirmed or contrasted with themes identified in the interviews. I found commonalities and identified eight key themes. Three collapsed into one theme leaving six key themes from all of the CSO data set. The key themes comprised the difficulty of communicating complex information to global customers, the struggle to impart comprehensive and accurate information that cuts right across the CSOs' propensity to help callers, the difficulty of meeting both call quality and productivity objectives, frustrating calls, and the supportive environment in which CSOs work.

I compared the key themes from both the CSO and caller data. I then asked how the themes identified related back to the structure of work and key tasks of the ICC, highlighting the effects of contradictions in their mission, that is between promoting and facilitating migration to or settlement in the country and recognising people New Zealand does not want and letting them know it.

## Chapter 4: The customer service officers

### 4. Introduction.

This chapter comprises the results of research conducted in the Immigration New Zealand Contact Centre (ICC). It presents data from two main sources: semi-structured interviews with 10 customer service officers and a daily diary of calls kept by nine of those officers over five days to capture their reflections. It is supplemented by informal observation of customer service officers at work in the Immigration Contact Centre. This included an opportunity to listen to a customer service officer (CSO) handling calls, viewing CSOs consult a senior CSO about their calls, and general observation of the call centre employees at work. Supplementary data included an interview with the manager of the Immigration Contact Centre, and documents that indicate the organisational context, and the wider context in which the organisation is located.

The data indicate the very demanding conditions the Immigration Contact Centre's CSOs endure. They share the challenge of communicating in sound bites to potential migrants, temporary visa holders, people unlawfully in the country and New Zealanders with a personal, employment or business interest in immigration, complex information about immigration legislation, policy and procedures. The pressure to provide instant answers to complex problems emanates from the culture of call centres to manage calls quickly (Humphries & Camilleri, 2002). While the migration of the call centre model to public services has produced jobs with very different content from those in call centres engaged in routine commercial activities, employees are still subject to productivity objectives and required to be customer-oriented. Given the accountability of public servants to multiple stakeholders, it is understandable there is also a strong emphasis on ensuring the accuracy of information. The CSOs reported difficulty meeting productivity objectives given the need to spend time providing callers with information to achieve quality standards including the "quality, one call resolution" objective.

The immigration experience can be fraught for prospective migrants and their New Zealand contacts particularly if their emotional and financial investment does not produce the desired returns. CSOs are required to “take care of people in highly challenging and stressful situations” (MBIE, 2014c). Selected for their pro-customer attitudes, CSOs find they are not always able to help callers.

Appreciating the significance of the information they provide, CSOs grapple with having to give unpalatable information. Their approaches range from feeling personally affected, to sugar coating bad news, to taking the time to listen and to express empathy, to maintaining an emotional distance. In acknowledgement of the high emotional content of the work the ICC manager has attempted to provide a healthy and safe environment. CSOs again and again expressed appreciation for the support they received from their colleagues, senior CSOs and immigration managers to deal with the informational and emotional demands of their work. The supportive ‘communities of coping’ described by respondents are congruent with Korczynski’s (2003) research showing that call centre employees rely on colleagues to mitigate the emotional stresses of their work.

The data have been organised under six main themes (Table 3). The first theme ‘quality versus speed’ discusses the conflict between meeting call quality and call volume requirements. ‘Communicating complex information’ illustrates the difficulties CSOs experience locating and understanding immigration law, policy and procedure and explaining how these apply to individual situations. The third theme ‘helping versus gatekeeping’ encapsulates the conflict between assisting callers and applying rules and regulations. ‘Empathy versus accuracy – giving unwelcome information’ is about the experience of giving accurate, but unwanted information. ‘Frustrating calls’ refers to a range of irritants that CSOs experience. ‘Support from others’ is about the assistance CSOs receive from one another and senior staff. The relevant aspects of the interview, diary and observational data are included under each theme and they are separately identified.

**Table 3*****Customer Service Officers' (CSOs') (n=10) - Main Themes***

<b>Themes</b>	<b>Interviews</b>	<b>Diaries</b>	<b>Observations</b>
Quality versus speed	6	7	6
Communicating complex information	10	3	2
Helping versus gatekeeping	9	9	4
Empathy versus accuracy	8	4	2
Frustrating calls	5	3	5
Support from others	9	3	5

**4.1 Quality versus speed.**

'Quality versus speed' was a theme identified in six CSO interviews, during observation and in seven CSO diaries and it permeated other themes. It also refers to other performance requirements that may conflict such as between expressing empathy and providing information quickly.

The CSOs' interviews and diaries indicated they experience difficulties with trying to simultaneously meet quality and productivity performance objectives. CSOs feel compelled to give information quickly, but they also realise the need to take sufficient time to impart quality information especially with the emphasis on "one (or first) call resolution" (answering explicit and implied needs and adding value to the calls by pre-empting and meeting the callers' future needs for information) (Department of Labour, 2011a). Respondents were aware that all calls are recorded and regularly assessed for quality. The recordings are kept for two years and are therefore available for scrutiny should there be a complaint.

The Immigration Contact Centre manager (2011) said that when he assumed the role he reduced the focus on statistical targets to relieve pressure on the CSOs so that they could focus on



quality and take as long as they needed to respond to each call. Later a greater focus on statistical targets was re-introduced as indicated by the ICC's Strategy for 2011/2012 to reduce waiting times to below one minute. The ICC documents such as the CSO Staff Performance Plan 2012-2013 (see Appendix F) show that there is statistical computation of productivity *and* assessment of CSOs' accuracy and customer service behaviour. The templates used for assessing quality provide for percentage scores to be awarded, showing quantitative measurement and qualitative assessment are not exclusive. Taking an extract of the Call Observation Sheet (Department of Labour, 2011a) (see Appendix J) as typical of the various measures of CSO performance, the wide range of criteria aimed at assessing the quality of the CSOs' interactions are staggering. There are two sections, namely customer and technical scores. Under customer scores there are eight sub categories. They not only specify some of the content of interactions, but also the language to be used and the components of CSO speech such as tone, pace, pitch, and emphasis. The latter include assessments of a range of criteria to judge the level of customer service such as whether the "greeting is complete and clearly spoken", they "listened to everything and responded appropriately", "had a good pace and made use of pauses", "met client needs", used a "confident voice" and "there was no "dead air" or other inappropriate silence." Criteria are employed to assess call closure, listening skills, attitude, whether the customer is kept informed throughout the call, and whether first call resolution actions were taken. There are yet more criteria under the technical scores section where there are another seven sub categories for assessment.

The average call handling objective for CSOs is 5:30-8:00 minutes (7:00-10:00 minutes for the business-to-business team). CSO9 reported he was a "*bit fidgety*" about the productivity measures although he suspected he might be placing too much emphasis on these because "*the quality of the service you are giving out rather than your overall efficiency is what they like to emphasize.*" CSO6 stated however, "*No matter what you have heard or anything, it is still a stats role.*" The CSOs used the term "stats" when referring to their productivity objectives. However

CSO6 qualified her statement. *“Even though we are back to stats driven (we always were but), we don’t feel the pressure as much as we used to.”*

CSO3 pointed to the wide variety of factors that affect the information they provide. Within one family there could be different visa requirements, particularly if members hold different citizenships. The need to customize information to the wide range of circumstances presented by callers extends call times. Some CSOs emphasized that while some calls last an hour others take only two or three minutes and it *“balances out”*, *“they tell us this”*. At the same time the CSOs spoke of the dilemmas they experienced caused by the conflict between speed and quality and speed and customer orientation. Despite the management emphasis on quality and the performance objectives, which indicate timing is largely considered within the context of quality, there was ambiguity about which took priority, experienced at the workplace level.

The conflict between achieving quality versus speed, presented frequent dilemmas for CSOs and their choices impact on the comprehensiveness of the information they provide and how effectively it is communicated. Decisions include whether to seek advice from senior CSOs if there is a queue of CSOs waiting to do the same, whether to use aids like the interpreter service, and whether to coax and question callers in an effort to identify latent information needs. Choosing to do any of the preceding will help satisfy quality objectives and implement the ICC’s first call resolution strategy, but it will also lengthen call-handling time. CSO3 said he felt confused.

*It always comes down to you know everyone having that sort of not very clear whether they should be sticking to their call time or focusing on giving the quality service even though that may take 20 or 30 minutes. I don’t know who we should be pleasing, either the client or the manager. (CSO3).*

This statement illustrates Korczynski’s (2002) description of the dilemma facing front line service workers, namely the difficulties of satisfying two bosses - the customer and management, played out in deciding whether to spend time providing customer satisfaction or to handle calls as quickly as possible.

While there were some exceptions, mostly quick exchanges were observed when senior CSOs were consulted by CSOs. The interviews, diaries and informal observation indicated the speed was driven in part by the ICC's productivity objectives. The quick interactions did not allow much time for a full description of the callers' predicaments nor for a comprehensive response from the senior CSOs. A senior CSO announced that when meeting new CSOs he explains that he may appear "*blunt and arrogant*", but that is the most efficient way to communicate. This is understandable given the time pressures staff members are under. A CSO, who had consulted a senior CSO, was observed turning away, throwing his hands in the air and exclaiming, "*but*". Other CSOs were waiting to talk to the senior CSO and certainly physical queues appeared to hasten exchanges. CSOs sometimes abandoned queues without speaking to a senior CSO at all, potentially affecting the accuracy of their information. The diaries and interviews suggested the significant challenges CSOs encounter satisfying callers' information needs within the average call-handling time target. CSO9 stated the most important aspect of his job was:

*Ensuring that we give out correct information and you know not sort of withholding information so we only give them half the story, but at times it kind of feels like that. It is not always easy to answer someone's question and not delve into their circumstances to figure out the best way to help them out.*

CSOs' sensitivity to callers' expectations of quick information giving also exerted pressure. Although the ICC manager had emphasized the importance of call quality, some CSOs felt compelled to provide quick answers if the caller had been waiting.

CSOs must accurately enter call notes in CMS, a contact management system that interfaces with AMS, the INZ application management system, and these records contribute to a picture of the potential migrant or temporary visa holder. The quality of these notes is evaluated using numerous criteria. The accuracy criteria specify they must be a true reflection of the conversation and a correct interpretation of the file. CSOs decide whether to record call details while handling the call, or take notes and enter these in the automatic 12 seconds of "wrap up" time the CSOs have to enter

notes between calls, or to put themselves on “after call work”, coded as “not ready” to complete their notes, or to enter the notes on the previous call while taking another call. The ICC manager said CSOs are encouraged to enter notes while on each call. A CSO was observed entering data at high speed into numerous fields including caller name, client number, call reason (selected from options), relevant branch, and action taken, and classifying the cause of the call as either “value demand” (when the customers want something they could reasonably expect INZ/ICC) or “failure demand” (when INZ/ICC does not do something that the customer could reasonably expect them to do). Not all CSOs said they felt able to accurately enter notes during calls or within the automatic 12-second period. Some said they completed the previous call’s wrap up while they were taking the next call. Taylor et al. (2000) observed this practice in their field studies of UK call centres and attributed it to the relentless volume of calls and the lack of control over whether to take calls. This practice may lengthen the call handling time and perhaps distract the CSO, but it will increase the CSO’s and the ICC’s key statistic “voice ready”. This is the percentage of time during a given period that the CSO is either active on a call, or available to take calls. The need to accurately record the call details (quality) and link them to applicant information in the INZ Application Management System competes with the “voice ready” (productivity) statistic creating considerable pressure for staff.

A further conflict was observed between quality and customer-orientation. The ICC strategy, “one (or first) call resolution” raised questions for the CSOs about how much detail it was in the customers’ interests to provide. First call resolution rate is often the “Holy Grail” when it comes to contact centre performance measurement (Jefferies, 2013). The aim of this requirement is to resolve most, if not all, of the query at first point of contact and pre-empt future information needs, so at the conclusion of the call it is unlikely that the customer will need to call back for further information. CSO3 argued:

*If you give them all the information that they needed, thinking that well that's the quality service we think we should be giving, the customer may think, "that was an info dumping and now I don't remember anything".*

CSO1 was adamant that she did not experience a conflict between quality objectives and call volume objectives. She mentioned she is careful not to overload people with detail, however she had been advised by her manager to spend more time with callers and give more information because her average call handling time was lower than for the rest of her group. In some respects CSOs cannot seem to win.

Another tension was highlighted between empathy and speed. Empathy is required of CSOs according to the Call Observation Sheet template (Department of Labour, 2011a) however this can conflict with the productivity objective. A CSO spoke of a predicament between meeting productivity targets or providing a humane service. CSO2 recorded in his diary that he went out of his way to accommodate the caller's situation *"when it would have been more efficient to be cold."*

The pressures on CSOs are considerable and while they appear to have the general impression the emphasis is on the quality of their calls, they were acutely conscious of their productivity objective and measures. Their performance is constantly monitored and routinely evaluated against an exhaustive range of criteria. Some CSOs may make decisions that will shorten the call handling time, but also have a detrimental effect on how clearly they comprehend the caller's needs and how well the caller understands the information they are given. CSOs can find themselves in an impossible situation because the drives to achieve accuracy of information (quality), to tailor information to meet the caller's circumstances and to show empathy (customer orientation) at speed (quantity) are often contradictory.

#### **4.2 Communicating complex information.**

Customer service officers (CSOs) provide information about immigration related law, policy criteria and procedures (Department of Labour, 2010). All the CSOs discussed problems with

understanding and then conveying complex immigration information by telephone and email and three referred to this in their diaries. All CSOs reported that some of the instructions are poorly written and formatted, which can create difficulties communicating information to callers, particularly where CSOs feel pressured to achieve their call volume targets and to meet callers' expectations of receiving clear information quickly.

IR9 noted, *"Even people who are experienced in immigration can be caught out by the subtleties of the immigration instructions."* Two CSOs gave as an illustration applying the Long Term Skills Shortage List contents to callers' qualifications and employment experience. CSO3 concluded:

*.... a lot of the time we have to go to the seniors and they ... [say] "okay yeah we will just go by what it says here" and we will just read it out to the client to make the decision.... since we can't make the decision for them.*

The utilization of the "rule" that CSOs cannot make decisions for callers who are faced with poorly presented policy is an understandable way of coping with the expectation of quick answers the call centre model creates for both callers and CSOs. The ICC depends on policy documents written elsewhere in the organisation. Making improvements to these documents takes time and so employees have to find immediate ways of dealing with problems created by poorly drafted or unclear instructions and procedures. CSO3 noted callers frequently persist in response to unhelpful advice. CSO5 commented that some advisers deliberately misread the policy because they are trying to find away round an instruction that does not go the way they want. CSOs are caught between receiving policy presented in a way that makes it difficult to understand and communicate and callers' expectations they will receive information quickly on which they can base significant decisions such as whether to apply for a visa.

Due to the voluminous nature of the immigration instructions CSOs 1, 2 and 6 stressed the importance of asking questions to tailor the information to the callers' needs. Regardless, CSOs and callers can lose track.

*Sometimes you can get lost in it as well because you kind of lose your place in what you are advising. You kind of wonder whether you have included absolutely everything you have to consider although you try and cut out the extra bits by asking them questions. (CSO2).*

Numerous factors impact on how the instructions are navigated including layout, terminology and grammar. CSO9 said of the Operational Manual that contains the instructions *“it can look like a bunch of legal fidgey widgey.”* CSOs noted that some of the terms are confusing. Problems finding information also hampered the ability to give accurate answers, as did the lack of an instruction. For example, three CSOs commented during interviews on the need for a specific provision to guide visa applications from people in a personal relationship with a New Zealander, but who do not meet the partnership criteria. That immigration issues frequently overlap with employment law also causes problems. In a diary entry CSO9 expressed surprise and confusion that a caller’s work visa was invalid for reasons beyond his control. The pressure to meet productivity objectives does not sit easily with providing complex information, particularly when the news is unpalatable. Provision for granting visas as a matter of absolute discretion also caused difficulties because counter intuitively the decision-maker is not obliged to give reasons for a decision. This was hard to explain to callers who had their requests declined. As Anderson et al. (2006) observed staff in some government call centres need considerable legislative and conceptual skills as well as competency in emotional labour.

CSOs are expected to provide accurate and up-to-date information and are warned against relying on “head knowledge” (Department of Labour, 2011a). During observation the oft-heard refrain when CSOs were handling calls was “I’ll just check on the notes again”, “Can I put you on hold again?” This indicated that CSOs were establishing the accuracy of their information – by accessing databases, checking and re-checking the instructions and conferring with peers or senior CSOs. It is necessary to routinely check information because instructions often change making it hard to keep abreast of policy. To give an example, from January to September 2014 there were 10 Amendment Circulars and each of these contains notice of numerous amendments. There were 14

“advice to immigration staff” memos on the interpretation of the instructions and best practice and two Internal Administration Circulars providing information to staff on procedural and process issues. CSOs 7 and 10 voiced concern over the amount of policy CSOs have to keep up-to-date with and what they could miss if they were absent from the ICC. One of the CSOs mentioned there were sections in the policy even the ICC could not get clarification on from the wider organisation.

Uncertainty was detected in trades between CSOs and callers and senior CSOs. One conversation included the phrase, *“There is no clear cut answer”* with another CSO replying, *“There never is”*. These statements indicate the complexity of policy and procedure and the ambiguity CSOs must deal with through their working day. Several CSOs remarked that if callers detected hesitation calls can be prolonged.

*If I sound uncertain then they are going to say “Are you sure you know?” “Can I do this instead or can I speak to someone from the branch?” (CSO2).*

CSOs were often observed consulting senior CSOs. The responsibility senior CSOs carry is heavy and the extent of the knowledge they need is considerable. A senior CSO remarked *“I can’t believe how much information and knowledge I have sometimes.”*

Some of the CSOs said they were embarrassed when callers, including immigrant representatives, knew the policy applying to their circumstances better than they did such is the voluminous nature of the instructions. CSO4 remarked that some clients know more about immigration policy than their licensed adviser or lawyer and recounted calls where immigrant representatives had asked very basic questions. They identified varying levels of legal, policy and procedural knowledge in advisers and lawyers (from very little to very knowledgeable) and equally wide ranging attitudes (from arrogant, demanding and intimidating to understanding and respectful) in the way they spoke to the CSOs. *“I know from my colleagues there are some lawyers who are like “I am a lawyer”, kind of attitude” (CSO4).* CSO irritation with such arrogance is reminiscent of a call centre in Russell’s (2009) survey that medical professionals had to contact for authorization numbers that would allow their patients’ medication to be subsidized and where callers resented



having to explain why they had prescribed particular medication. In contrast four CSOs talked about working with solicitors and licensed advisers as peers and collaborators in order to work through difficulties in identifying and interpreting policy.

*We'll say, "I don't really know about this kind of policy here. Have you found anything on that?" and they'll say, "no I can't really see anything" and then we'll kind of work in tandem to find the answer. (CSO2).*

There was no sign the CSOs considered service provision by the private sector "distasteful" (Lovelock & Trlin, 2000, p. 35). They appeared to accept that advisers and lawyers are part of the immigration system, some viewing them as INZ's 'partners' in facilitating immigration. When dealing with expert callers CSOs have to adapt to the wide range of knowledge levels tactfully dealing with those immigrant representatives who expect their expertise to be acknowledged and those immigrant representatives who like other callers want help even with basic information.

The challenge "to navigate complex policy information" is acknowledged in advertisements for ICC staff (MBIE, 2014c), and the very demanding and copious criteria CSOs have to meet are set out in the CSO Staff Performance Plan 2012-2013 (Department of Labour, 2012b) and other documents. There is no doubt that CSOs perform high-end functions when assessed against many call centre jobs. They employ what Frenkel et al. (1998) termed lower-order (policies, procedures, software) and higher-order contextual knowledge including conceptual understanding (for example, of discretionary decision-making) and the extent of the information they must refer to when assisting callers is vast. CSOs also require limited theoretical knowledge such as of the administrative legal principles of fairness and natural justice. They have to understand the caller's situation, probe for latent information needs, identify, locate and understand the relevant section of law, policy or procedure, then attempt to meet the challenge of applying and imparting the information clearly to callers all within the average call handling target of 5.30 to 8.00 minutes. The challenge is made nigh impossible when CSO have to work with policy that is poorly drafted.

### 4.3 Helping versus gatekeeping.

Callers expect the ICC to offer information and assistance, however CSOs must apply specific rules and regulations. All the CSOs said or wrote they wanted to help callers in accordance with the customer-culture, but also in line with the notion that public servants are required to help people (Copas, 2004). The CSOs attributed their inability to help callers due to their gatekeeping function. Gatekeeping comprised conveying immigration law and policy, observing privacy legislation requirements, and adhering to the Immigration Contact Centre's internal rules. The nature of INZ decision-making on visa applications, failures of staff in the wider organisation to fulfil their undertakings to clients and to keep the ICC informed about significant changes, the limits of ICC technology, and the behaviour of callers, and inconsistencies in the application of policy and procedure also inhibited the CSOs' ability to help. Information from nine interviews and nine diarists contributed to this theme.

CSO3 said he chose to work in the ICC because the focus was on providing the best quality service, not on profit. The Call Observation Sheet (Department of Labour, 2011a) stipulates "a real willingness to help the customer is evident, even if the customer's needs cannot be met" and all the CSOs said they wanted to help callers, but there are inevitable situations where callers' circumstances do not meet policy criteria. CSO1 wrote that a difficult call was when the client's predicament does not *"fit"* the policy. Unlike case officers who often have minimal contact with applicants, the CSOs' interviews and diaries show they hear first hand from sons, daughters, mothers, grandparents and partners about their circumstances. That many CSOs used these terms indicated they related to socially embedded callers rather than customers (Korczynski, 2002). This was the case despite the one-off interactions. Perhaps this was due to the highly personal nature of the calls and stressful situations. Helping individuals solve their problems and receiving their gratitude increases the satisfaction of customer service work, but service work can also occasion pain, or in the instance below exhaustion, if callers react negatively when CSOs cannot give callers the answers they want (Korczynski, 2002).

*Sometimes it can feel exhausting when you try to help someone get a particular type of visa and then you find that there is no way they can do it. And then you have gone through every option and you have exhausted your mental capabilities and it's like "Well I couldn't help that person get their visa but that's because there is no policy for them".... Exhausted and I suppose a little bit, I mean I can't find a more specific word, but a little bit down I suppose." (CSO2).*

Three CSOs said callers expected them to have more power than they do and four CSOs said some callers expect them to be all knowing. A CSO said the expectations of immigrant representatives were more realistic than those of other callers because they understood limits of the assistance CSOs could offer. CSOs do not have the authority to reverse decisions or to make exceptions to policy. All they can do about declined applications is convey the reasons for decisions and outline appeal rights and the complaints process. They could help callers with emergencies by asking the branches to speed the issue of visas or facilitate the re-entry of New Zealanders with expired passports. This was the enabling aspect of the CSOs' role.

A senior CSO was heard concluding a consultation with a CSO with the phrase, *"There are no guarantees."* This was heard several times during observation and interviews, as were the phrases "no assurances" and "case by case basis". These refrains may unsettle callers who call seeking reassurance and authoritative advice. Given the discretionary powers of case officers it is not possible for CSOs to assure all callers about the likely outcome of their applications. The phrase "no guarantees" has even more emphasis if the caller's situation would require an exception to policy or where decisions are a matter of absolute discretion. On this subject CSO4 pointed to a fundamental tension between the flexibility provided for by the discretionary powers delegated to some immigration officers so that individual circumstances can be taken into account, and the need to apply government policy uniformly. He felt discretionary decision-making was sometimes employed to justify inconsistency. Instances of inconsistency (e.g., exceptions) in the branches

could affect how the CSOs' advice based on normal policy was viewed. *"It's a very delicate balance I mean how flexible are you allowed to be until it crosses the line."* (CSO4).

For CSOs gatekeeping involved telling callers they needed to follow process even in emergency situations. CSO8's diary recorded she was sympathetic when advising an emotional caller, whose father had suffered a stroke, that he would need to seek a special direction to visit because his father had a criminal conviction.

CSO3 remarked callers were incredulous when advised he could not tell them the outcome of their applications because of an ICC rule, even though the Online Service recorded a decision. That callers might suspect the CSOs were not warranted immigration officers indicated frustration about how the CSOs' status is viewed by some callers compared to the status of case officers. The very notion of a "case" invokes analogies to professional work, for example, legal in which resolution is a skilled activity whereas CSOs 'merely' provide information.

While Immigration New Zealand is listed alongside immigrant representatives on the Immigration Advisers Authority website as a source of immigration advice, most CSOs were very clear that they only provide policy and procedural information to callers. They stressed that in the main they give options rather than advice. New Zealand lawyer Katy Armstrong distinguished immigration advice and information on the grounds the latter involves the provision of information (Tennent, 2013). Giving advice involves the interpretation of law and policy and how it would apply to a particular individual (Tennent, 2013). CSOs do provide information and advice according to this definition, but the data indicated that unlike immigrant representatives they do not all assist applicants to shape and present information in the best way possible to increase their chances of gaining a visa. CSOs cannot be completely customer centric.

CSOs have to follow a verification process with each caller, as they must only release personal information to those who are entitled to it. This can provoke negative responses. Five of nine calls made when the researcher was listening in on calls were enquiries on behalf of others. Ignorance of the interpreter service might encourage customers to have others call for them.

Gatekeeping extended to declining to provide information callers sought even though it concerned them. To give an example, CSO8 said it was difficult to satisfy a New Zealand resident who wanted to know why she was always questioned at length whenever she re-entered New Zealand without alerting her to INZ's suspicions.

*Why is she always being asked at the border? They question her for several hours and she's a resident. She is like "why does it always happen when I travel back to NZ?" There's an alert on her file that she is accused of bringing in people. Anyway so you can't really tell her the reason. You can't really say because you are bringing in people. Yes and you are not supposed to let her know. So it's really quite hard and you don't know how to answer that. Yeah so sometimes it's really vague because sometimes there is information you see that you can't release. (CSO8).*

CSOs recorded in their diaries apologising for failures by staff in the wider organisation. A case officer may have broken a promise to contact a caller or may refuse to speak to clients leaving CSOs to cope with frustrated callers. CSO4 said the ICC had been "abused" by employees in the wider organisation in that they encouraged people to call the ICC with whatever questions they had even if these fell outside its remit. CSOs 8 and 10 noted in their diaries failures by branch staff to update information in the Application Management System caused problems. These concerns may indicate a difference in the way CSOs and visa application processing officers view their clients. For the CSOs the callers are customers and this is reflected in the ICC's texts such as advertisements for CSOs and associated job descriptions. In the visa processing branches individual clients are referred to as applicants.

A sub theme was 'inconsistencies' because these hinder the CSOs' ability to help. Eight CSOs discussed this topic. The ICC manager noted people might call the ICC and then call back, reword their question and receive a different answer. He said all calls are recorded and in nine out of ten complaints the customer has been given right information and misinterpreted it. This parallels a statement by an immigrant representative that callers could come from speaking to the ICC with

inaccurate perceptions having misinterpreted the information they were given. The discretionary nature of immigration decision-making and discrepancies between the visa application forms and instructions were proposed as causes, but the CSOs largely attributed the problem to inconsistency between branches in their procedures and in their interpretation of the instructions. CSOs cannot guarantee all branches will behave in the same way. This reflects the findings of the Controller and Auditor-General's Inquiry into immigration matters (2009) that found excessive variations between branches in the systems and processes they used to make decisions.

*They [the branches] have all got their own ways of doing things and some of those procedures are totally different from [each other] and we are all in the one country, sometimes in the same island and even in the same city. (CSO6).*

CSO7 found her secondment to a visa-processing branch invaluable for closing the gap between the ideal (as indicated by the instructions and knowledge base) and the real (how branches apply the instructions). “*You are seeing the practical side of things that you are advising over the phone.*” CSO1 considered experience in a processing branch after initial training in the ICC would provide a broader view of the immigration system. Bagnara, Gabrielli, and Marti (2000) noted that often call centre staff had only a limited view of the system within which they operated, hampering their ability to serve the callers.

CSO4 said the ICC is not always informed about significant changes such as the introduction of Visa Accepting Centres and that it was embarrassing when CSOs hear about these changes from callers. Lack of up-to-date information from the wider organisation could result in inconsistent advice. CSO4 mentioned that he wished the processing branches would keep the ICC informed about initiatives.

The CSOs indicated frustration with their position, relative to case officers, and their inability to provide information confidently. CSOs cite many reasons beyond their control about why they cannot always help including their gatekeeping role. Their accounts indicate frustration, irritation, helplessness and a lack of confidence in some of the information they provide. They

know that there are inconsistencies in the INZ system yet callers (and some licenced advisers) have disproportionate expectations, expecting them to know everything. Uncertainty reflected in exchanges due to the CSOs' awareness of inconsistencies in branch policy interpretation and practices, may discourage potential migrants, prolong calls and result in repeat calls.

#### **4.4 Empathy versus accuracy - giving unwelcome information.**

CSOs' customer-centric propensity clashes with their responsibility to provide accurate information. Eight interviews and four diary entries provided material for this theme. Recruitment advertisements for CSOs seek applicants who are "totally customer centric" (MBIE, 2014c). Quality measures include "Provided clear accurate information and quality service. Maintained a customer centric environment" (Department of Labour, 2012b). This measure of quality is infused with contradiction in that it is impossible to maintain a customer centric (positive) environment when giving accurate information requires telling a customer their aspirations cannot be satisfied. CSO4 said, *"What I say is not what I want to say necessarily."* This conflict is heightened by the expectations some callers have of what call centre employees can do to help them. *"Callers expect a good experience when they call through."* (CSO10). The friendly greeting callers receive when they contact a CSO may reinforce those expectations. Despite cautionary advice by Immigration New Zealand, that many callers have paid a visa application-lodging fee may also foster an expectation their demands will be satisfied. In commercial organisations agents are required to give the impression the customer controls the exchange (Korcynzski, 2002). It is not always possible to maintain that impression when customer wishes clash with government policies. Applying immigration rules and regulations, often means people cannot get what they want yet callers *"expect to hear what they want to hear"* (CSO1). The encounter with the ICC usually centres on an evaluation of an applicant's attributes against policy criteria. In many instances these will not match. Rejection can be devastating and CSOs are required to show empathy. According to the Call Observation Sheet template CSOs are expected to use positive language and communicate a

positive attitude *throughout their calls* creating impossible demands in these situations. Closing calls with the obligatory refrain “Is there anything else I can help you with” may well provoke a negative response from the caller who has just been given disappointing information. An empathetic CSO will not remain completely positive throughout an encounter where the caller is distressed. While this may be obvious, the glib prescription for positivity throughout all calls does not acknowledge the difficult emotion work that CSOs have to perform.

The highly emotive nature of immigration and the frequency of interactions with people in stressful situations indicate the CSOs are at high risk of emotional exhaustion (Zapf & Holz, 2006). A CSO described the difference between working for the ICC and a commercial call centre as like the contrast between chalk and cheese. She stressed that working in the ICC demanded a lot more of employees emotionally than working at a Sony call centre for example.

The CSOs’ accounts indicated they feel keenly the responsibility that goes with giving information that affects people’s lives. CSO8 said the thought she gave incorrect information early in her tenure still *“haunts”* her. CSO1 acknowledged the significance of the information CSOs give. *“It’s emotions...I mean this is their life at stake for most of them and you have to empathise.”* CSOs have to cope with callers’ feelings. CSO1 said she deals with this by providing options, that is, information about other policies, however many people will not be able to meet the criteria. CSO2 described feeling *“gutted”* if callers’ circumstances did not fit the policy. The CSOs’ diaries are peppered with verbs such as empathizing, sympathizing and explaining.

*I empathized with the caller. (CSO1).*

*Attempted to empathize with her. (CSO2).*

*Explained exhaustively the policy to her. (CSO8).*

*Was sympathetic to the caller (CSO8).*

CSOs described how they managed their own feelings, having developed various coping strategies. CSO4 recalled how he felt as a new recruit finding it difficult to deal with calls where he had to say no. He struggled preferring to impart good news. Initially he apologized and felt *“quite emotionally*



*invested in those calls.*” Later he told callers he appreciated their aims, explaining why they could not be realized. He still feels empathy, but does not find it as hard to say no, having no power to change things. He tries to deliver disappointing information in the best way possible, namely:

*a delicate balance on how to deliver what they want - a customized service and respecting their objectives and feelings, but at the same time you have to realize the fact that you are not there to facilitate their wishes.*

This account highlights the challenge of maintaining a customer centric environment while giving accurate information. A CSO said she has to “*sugar coat*” bad news. An experienced CSO said she listened to upset callers for as long as it took for them to express themselves and for her to respond empathetically ignoring the call time target. She believed management supported this approach citing the one call resolution requirement. Her approach also illustrates the public service ethic of helping people as reflected in the ICC’s Culture document “Respect and empathy” and “Go the extra mile.” It also alludes to the concept of ‘time embeddedness’ that Copas (2004) considered relevant to time pressured call centres. The callers require the CSOs to have as much time to deal with their queries as is necessary whereas the CSOs are embedded in the call centre setting where calls must be answered as quickly as possible.

While stating CSOs need to empathize a CSO also said very firmly that when giving bad news “*Well it doesn’t affect me personally in any way because I know it is the policy.*” Another CSO with above average tenure recalled a strong sense of injustice he had felt about the way the work visa policy allowed a family to live in New Zealand for 10 years until the father’s services were no longer required. He said the effects on individuals when their aspirations conflict with the regulations remain with him, but he had learnt to disassociate himself from their plight. He said he had become “*a bit more desensitised. Yeah you still have to feel empathy with people but I can’t actually get too personal.*” To cope with giving information callers do not want to receive CSOs adopt various approaches including apologising, empathizing, sugar coating bad news, emotionally

distancing themselves from the dilemmas of callers, and taking time to listen and to express empathy.

The CSOs' individual ways of coping with giving unwelcome information and callers' responses were similar to the three approaches Hochschild (1983) said employees adopted towards emotional labour in their work. Emotional investment in the plight of callers was comparable with Hochschild's (1983) example of the person who identifies too wholeheartedly with their job and risks burnout. When things did or will not eventuate, as the caller wished due to immigration rules, some CSOs felt personally affected. Hochschild's (1983) second stance, where the worker clearly differentiates between herself and the job she performs, but may feel insincere for consciously acting her role, was reflected in a CSO's assertion they had to disassociate themselves from giving bad news making a clear distinction between what they wanted to say and what they had to say. They empathized, but were not as personally affected by callers' disappointed reactions. Others appeared to readily remove themselves from their act (showing empathy while applying rules) of giving disappointing information making it very clear the responsibility lay with the policy. This approach reflects Hochschild's (1983) third stance where the worker understands the need to act, clearly distinguishes herself from the role she plays and accepts no blame for this. She may appear obviously acting and insincere and may withdraw her emotional labour completely.

Hochschild (1983) believed the psychological costs of emotional labour would be reduced if employees could feel more in control over the conditions of their work. One of the CSOs said she had decided to take as much time as she needed to allow callers to express their emotions and this approach made her feel more relaxed. That her tenure well exceeded the average may be partly attributable to the stance she adopted. Deery et al. (2002) found that agents who on average spent more time per call were significantly less likely to experience emotional exhaustion. They had hypothesized this would be due to providing the opportunity to create rapport, making the interaction more pleasurable however the comments of one of the participants indicated that it was due to deriving satisfaction from honouring the organisation's commitment to customer service by

taking the time to solve problems for stressed customers. The latter is similar to the CSO's explanation.

The Immigration Contact Centre manager noted the emotional content of contact centre work ranges from very low to very high content, as in emergency call centres, with the ICC featuring around the high end. CSOs receive 80 calls per day of which half could be of high emotional content. CSOs spoke of encounters where it was difficult to communicate accurate information because of the callers' reactions, causing frustration for both. To give an example, during her interview CSO1 described a call where she had trouble explaining to an angry New Zealand caller, whose husband's resident visa application had been under consideration for two years, that she would need to arrange for someone else to talk to her. The woman screamed despite repeated assurances the CSO wanted to help. CSO10 observed it was mainly New Zealanders who became irate and yelled down the line. The CSOs' accounts indicated New Zealanders harboured a strong sense of entitlement, often erroneously believing that their citizenship entitled them to bring other individuals into the country. Anger, despair and other strong emotions experienced in the moment where the caller confronts the reality that their aspirations and immigration rules do not meet, are directed at the CSOs rather than the case officers who decide applications, or INZ management or the law and policy makers. Anger may be more readily expressed because the interaction with the CSO is technologically mediated increasing the social distance between the parties (Bauman, 1989). That our true feelings are more easily gauged by voice only may heighten awareness of caller dissatisfaction (Argyle, 1994, cited in Bennington et al., 2000). Deery et al.'s (2002) study indicated that agents are more likely to suffer emotional exhaustion if callers became demanding and rude. Certainly CSOs are required to suppress negative emotions when dealing with some callers and this is often associated with emotional dissonance (Zapf & Holz, 2006). Amongst other factors Zapf and Holz (2006) considered that emotional dissonance might lead to the (chronic) detachment from other people's feelings, which may be related to depersonalization. In their study,

which included employees from 14 call centres, they found that emotional dissonance had significant positive effects on emotional exhaustion and depersonalization.

Even calls that appeared low in emotional content could occasion dramatic language. During the period of listening in on calls, a caller, enquiring about how to transfer a permanent resident visa to a new passport, a relatively simple matter about which the CSO was quick to reassure him, mentioned committing suicide if he had any more trouble. The CSO went beyond her brief to help the caller by giving him the contact details of the British High Commission.

During their working day CSOs are continually expected to be empathetic and to persist in providing accurate, albeit sometimes, unwanted information. Van den Broek (2003) found the tension to meet competing demands causes role conflict and frustration and is accentuated when workers are restricted in their ability to help people, particularly when the service involves empathy-based services. The limited nature of the CSOs' authority and their own accounts confirm they are often unable to do anything substantial to help callers. The data indicate the CSOs' empathy seemed to have little impact when they could not grant callers' their requests. The reactions to bad news underscored the high emotional content of the calls. The CSOs' diaries indicated that some calls deteriorated into abuse and also highlighted the support the employer provided by allowing the CSOs to terminate these. CSOs explained the steps they needed to take before disconnecting and some mentioned they successfully sought reassurance for their decisions from their immigration manager. CSO1 noted, *"What's really good here is that if someone is abusive you have got the option of hanging up instead of taking all that which is I think a good thing."* During observation a senior CSO took a break in the Quiet Room from the phones. The management approach at INZ is in stark contrast to the centres in Korczynski's (2003) study that required employees to endure abusive behaviour from callers to enable the organisation to keep the customers' business. The ICC manager had emphasised that the staff needed to feel safe and well and the decision about when to disconnect abusive calls is left to the CSOs. In addition to indicating managers trust the CSOs' judgement, this approach may reflect the strong union presence in the

ICC, compared to the private sector where unionization is generally at very low levels in neo-liberal economies (Batt et al., 2009; Deery et al., 2002; Korczynski & Evans, 2013). Leaving the decision about whether to disconnect abusive calls to the individual CSO may also be in part a consequence (even if unintended) of INZ's status as the sole decision maker on visa applications. While this invests employees with responsibility for honouring the trust invested in them, it also means customer service is delivered in a framework where the customer cannot elect an alternative supplier if they want entry to New Zealand.

Of the five CSOs who mentioned receiving abusive calls only one was male. Of the six CSOs who reported angry callers, only one was a male. Given the near even split of male and female CSOs that more female CSOs than males recalled instances of offensive calls indicated there could be a gendered aspect to the abuse. Korczynski (2003) found females were more likely to report abusive customers as a serious matter than males. CSOs reported instances where more male callers than female callers abused them or expressed anger. Hochschild (1983) proposed that in public contact jobs women's feelings are accorded less value than the feelings of men and they experience more exposure to abuse.

The counterpart to feeling "*gutted*" (CSO2) about giving unwanted information was recorded in all nine diaries where CSOs reflected on their depth of immigration knowledge, their professionalism and their mastery in solving problems to the satisfaction of the callers. They expressed pride in how clearly they explained policy to callers, guiding them to the correct part of the instructions. They recorded helping callers with emergencies by asking the branches to speed the issue of visas. They solved technical website problems for callers and facilitated callers' access to branches by relaying messages. CSOs enjoyed giving good news and advising callers when to lodge applications for the best outcome. They felt pleased with the self-control they exercised when handling complaints, calls from people with low-level English language skills and other difficult calls requiring emotional labour. The diaries indicated there was little time for the CSOs to celebrate positive calls due to the queues of calls waiting to be answered.

The emotional load on CSOs is very high given their position at the forefront of an organisation that makes decisions that significantly affect lives. The CSOs' accounts indicate both the immense personal satisfaction they derived from using their skills to help callers together with the opposite, namely pain when callers did not get what they want and focussed their anger on the CSOs. Management recognises these contrasting experiences in its commitment to CSOs' well-being by rewarding good performance evidenced by customer contentment with acknowledgements on the "wall of fame" board and other accolades, as well as trusting CSOs to decide when to disconnect abusive callers and by providing tangible support by way of a Quiet Room allowing CSOs some respite from the phones.

#### **4.5 Frustrating calls.**

'Frustrating calls' was a theme identified across all the CSO data (five interviews, three diaries, and five observations) and refers to a range of irritants. These included persistent callers, pushy callers, callers who provided insufficient information or described their situation inefficiently, and calls involving people who spoke little English and those which involved using the interpreter service.

Repeat callers include those who called because they had not asked all their questions or did not understand what they had been told. The ICC Failure Versus Value Manual provides examples of failure and value demand (see page 74) and four of those mentioned repeat callers, one person calling six times in a fortnight to check their application. Another example is where a CSO has provided incorrect policy information. This document supports the claims by both CSOs and IRs that incorrect or incomplete information results in repeat calls. 'Persistent callers' included those who called back because they did not like what they heard and persisted in case they could get something changed. It was the latter that caused the most frustration as reported by six CSOs.

The ICC manager emphasised callers need to be treated with empathy and respect, but some callers behaved in a way that made it difficult for CSOs to show either. They were people who

called repeatedly trying to get the answer they wanted. In a diary entry CSO10 recorded a call from a third-time caller who *“was irate at this stage because everyone refused to give details about his stepson’s application.”* He was repeatedly advised on the procedure to become authorized to receive the information he wanted, but he refused to accept this. Some persistent callers may have not fully understood what they had been told due to language or other difficulties however there will be those that warrant the label irritant. CSO6 noted her frustration with these persistent callers:

*It was a New Zealand citizen ringing up about his Filipino wife who was actually in The Philippines and he was here and he had been told that he could go ahead and apply for a work visa under Partnership. Go ahead and do it, but be aware that the criterion is that you are living together at the time of application and it’s a case-by-case basis. Well that wasn’t good enough. I don’t know why it wasn’t good enough, but by the time I got him it was like he wanted a “Yes, it’s going to be good enough. I have paid my taxes in New Zealand for the last 40 years and I don’t know why you buggars are doing this to me”.*

The common experience of dealing with nuisance callers appeared to engender a feeling of community in the CSOs. The communal experience was facilitated by the system wherein CSOs record and link calls to individual cases so that CSOs can see the caller has phoned before and they can also read what the caller has been told. CSO2 reported that licensed immigration advisers had called repeatedly.

*There was one guy who wouldn’t, like I consulted with a senior and everything, who wouldn’t believe a piece of policy that I advised him. He wouldn’t believe me at all. Because I had talked about it with my team and when he called back they were like I got that same guy and they advised exactly the same thing I did.*

CSO6 mentioned that when she first worked at the ICC she did not feel advisers and lawyers trusted her to give the correct information. This could cause repeat calls.

*I can't say that now though. I have found that that attitude has kind of gone.*

CSO7 said with a resigned rather than frustrated air:

*They [general callers] just want you to say what they want you to say, you know and it's like we have got to stick with the same.... We can't change it.*

CSO2 noted what he disliked about his work were:

*Occasions where you get a caller who feels as if they can argue enough or push us hard enough they can get somewhere in terms of their visas.*

These descriptions locate the callers as Bolton and Houlihan's (2005) 'mythical sovereign' customers where callers are aware of their supposed sovereign status, but because of productivity targets and the need for CSOs to provide accurate information about policy means the callers also learn quickly this status is mythical. An experienced CSO mentioned the need to be firm with persistent callers. A CSO noted a caller had telephoned three times with the same question and had allegedly been given different advice each time. CSO4 said:

*Sometimes it does happen where clients call multiple times. Rightly so because they have been given conflicting information from within the ICC or from another branch.*

The interviews indicated commitment to contacting the caller if incorrect information had been provided. Two CSOs spoke about feeling guilty if they had given inaccurate information. CSO6 felt annoyed whenever she became aware she could have given more helpful information.

There were occasions observed when callers appeared to be deliberately selective in the information they imparted and some contradicted themselves. Some callers seemed anxious their actions might negatively affect their options. In other cases they seemed too frightened to give identifying information because they knew they had breached their visa conditions. Hesitation is understandable given callers are dealing with public servants who are required to link all calls to files and a statutory body that has a compliance role. Sometimes callers, including immigrant representatives, took a long time to get to the point.



Other irritants noted in diaries and during interviews were the difficulties of handling calls from people with no or limited English even when Language Line (a telephone interpreting service) was used. An exasperated-looking CSO was overheard speaking very slowly to a caller, carefully enunciating each word. CSO8 wrote that even though an interpreter was used the caller had difficulties understanding. It was a long call and the CSO had to be very patient. CSO4 noted in his diary he had communication difficulties with a licensed immigration advisor. During the period of listening in on calls it took a few minutes for Language Line to arrange an interpreter and by that time the caller had disconnected. A CSO said this was a frequent occurrence. Using Language Line makes the calls longer and that compromises the capacity to meet productivity objectives. A CSO reported that they had been advised they could avoid Language Line if the subject of the call authorised someone else who could speak English to converse with the CSO. The Immigration Advisers Authority 2014 Code of Conduct Toolkit (Immigration Advisers Authority, 2014d) notes the numerous pitfalls of using an untrained interpreter. Even if a caller accesses Language Line with the help of an immigrant representative, all parties face the difficulty of participating in a four-way conversation between the caller, their immigrant representative, the CSO and the interpreter. Some of the CSOs 1 and 6 noted concerns when using Language Line.

*You know they [the interpreters] will say their own thing like they're immigration licensed advisers and I can't understand what they are saying, but I know what I asked them to say wasn't going to take that long to say, not translated in any language. (CSO6).*

CSOs found unjustified complaints about INZ difficult to handle. CSO2 expressed pride that he had been professional when explaining how and who to complain to when the fault (delay in the processing of an application) was mainly the client's.

Frustrating calls appeared to be considered as such because they could take up valuable time and therefore affect the CSOs' average call handling time. It was acknowledged by CSOs that some callers were justified in phoning back because inconsistent or conflicting information had been

given. Dealing with persistent nuisance callers seemed to impart a sense of shared experience for CSOs.

#### **4.6 Support from others.**

That CSOs appreciated the support they received from other CSOs, senior CSOs and immigration managers, was a theme identified in the nine interviews, three diaries and evidenced on five occasions during observation. Six CSOs mentioned in their interviews that they enjoyed the job because of their colleagues. In addition to locating information and confirming its accuracy, CSOs depended on immigration managers to develop their skills and on both senior CSOs and managers to deal with escalated calls. CSOs also found senior CSOs and immigration managers valuable for debriefing after difficult calls and for recognizing effective calls.

The CSOs' high level of empathy was cited as the reason by six CSOs for enjoying their job. Frequent chat, laughter and friendly gestures were observed and CSO6 commented that people were happier than they had been under other management because they were no longer treated like children. Unlike the relations between CSOs and management in many call centre studies, eight CSOs said they valued the support from seniors and immigration managers and three diarists echoed this. Experienced CSOs found senior CSOs valuable for double-checking information and for finding information quickly. Newer CSOs depended heavily on senior CSOs and immigration managers for policy and procedural information. Because the immigration manager role includes CSO performance evaluation, one CSO was concerned that any questions they asked could reflect negatively in their Performance Review. This could impact on the quality of advice provided.

The relationships between CSOs and senior CSOs appeared to be characterized largely by mutual respect and trust. A reflection of this was observed when a CSO began their consultation with a senior CSO, with the phrase, *"I messed up with a client about a visa waiver"*. Not every aspect of the relationship between CSOs and senior CSOs was open. A CSO observed senior CSOs can make mistakes and that if he were not confident about the advice given he would cross check

the information with someone else covertly. He said while they were encouraged to ask for a policy reference when receiving advice from senior CSOs, there was no formal process for double-checking information and it appears CSOs may experience discomfort in such situations.

The ICC manager advised that immigration managers and senior CSOs observed call traffic through Information Manager software. A senior CSO noted they check on whether CSOs are “skiving” indicating they have a performance monitoring and corrective function in addition to providing support. CSO3 mentioned that he received a message from an immigration manager along the lines of “*Why are you on ‘not ready’ for this period? ... Can you get in control of your stats?*” A senior CSO remarked during observation he intervenes to see if he can help if he notices a lengthy call. Senior CSOs also handle some of the calls CSOs cannot deal with.

Coaching CSOs towards independence was observed in senior CSO interactions as well as an appreciation of the pressures CSOs experience. A senior CSO addressed a CSO, “*I will help you if you are seen to be helping yourself*” and he noted that when checking forms before they are passed on to the branches, he takes a lenient approach if a CSO has failed to fill a mandatory field because they are so busy.

During observation of CSOs consulting a senior staff member, a slightly cynical, humorous attitude towards the predicament of callers was witnessed. Some callers were considered responsible for the situations they sought help to resolve. This approach may permit the senior officers and consulting CSOs to get some distance from the predicaments. Some callers were considered imperious, approaching the process of migrating to New Zealand as if they expected to be able to gain residence as of right, showing arrogance in their dealings with the ICC accordingly. The mildly irreverent approach observed on the call centre floor counterbalances the requirement to treat customers with respect, friendliness and empathy. It could well offer some relief from the multiple performance requirements on CSOs, acting as a safety valve helping employees cope with their demanding roles. In this way it helps to ensure that the call centre operates smoothly by enabling staff to vent emotion in a way that does not compromise the work of the call centre.

The data indicate that CSOs experienced very supportive relationships with colleagues.

*It is more open here for you to approach the managers or the seniors for support.*

*There is that sort of relaxed, helpful environment. (CSO5).*

*Jason's one of the new managers who has come in and put more emphasis on quality and just focused on creating a better overall work culture, which again is one of the things I like about this job. This particular work place is very positive and there are lot of really nice people here. (CSO9).*

*I love my manager. She really encourages me. She is making me improve. (CSO10).*

That immigration managers have a role in performance evaluation dissuades some CSOs from seeking their assistance. The expectations of senior CSOs that they will provide correct information not only places them under pressure, but may also inhibit challenges to the answers they give. In some instances this will affect the accuracy and therefore value of the information provided to callers.

#### **4.7 Conclusion.**

In terms of Spenner's (1990) skills dimensions, the CSOs' work integrates complex data (interpretation and application of legislation, policy and procedures), interpersonal skills (exercise of emotional labour caring for people in highly stressful situations) and manipulation of telecommunication and computer hardware and software. In so doing it requires considerable ethno-methodological tact, but provides little autonomy control because the very detailed individual performance requirements, relentless distribution of calls, surveillance, monitoring, and inability to vary the tools used, limits the ability to control the order, content, manner and pace with which tasks are completed. To do their jobs CSOs require lower- and higher-order contextual knowledge and some theoretical knowledge. In regard to Russell's (2009) proposal that job skill requirements are likely to be higher when the information aspect of info-service work predominates, the work of the CSOs certainly involves a complex two-way exchange of information with the agent obtaining,

retrieving, interpreting and communicating information to generate results (information) for the caller. Their tasks matched Russell's (2009) description of interpretive labour because CSOs have to ask questions to identify caller demands, apply the relevant aspects of complex and changing legislation, policy and procedure, and communicate their findings to the caller. Russell (2009) found nothing was 'black and white' in a public sector call centre where agents had to carefully question callers to identify relevant features in their unique situations and decide eligibility for and disbursement of benefits in accordance with legislation and policy. CSOs do not decide visa applications, but they provide information on which decisions to lodge applications are based and that influences other actions bearing on an individual's immigration experience. The effort for the CSOs is increased when they are challenged about the information they provide, when calls are lengthy, and when calls are highly emotional due to the significant consequences for callers of the information CSOs work with.

There are features in the reported experiences of the CSOs in the Immigration Contact Centre that resonate with prominent observations in the literature review. Given the research aim, the most deserving of attention are the problems created for the CSOs by the tensions that infuse call centre work, namely cost efficiency and customer orientation (Korczynski, 2002). These set up competing expectations that CSOs cannot always fulfil. Due to the significant effects of incorrect information on individuals, the need for transparency in the interests of public sector accountability and the scrutiny to which many immigration decisions are subject, the pressure on the CSOs is intensified by the requirement to provide accurate information (URCOT, 2000; Burgess et al., 2005; Russell, 2009). These three drives not only compete, they are intertwined in CSOs' experience of work as reflected in the ICC's texts including the CSO Staff Performance Plan (Department of Labour, 2012b) and recruitment advertisements (MBIE, 2014c). The need for accuracy takes pride of place in the CSO Staff Performance Plan 2012-2013 (Department of Labour, 2012b) although the potential for differences of interpretation in a complex and fast-changing policy environment mean little is clear-cut hence the CSO refrains "no assurances" and "case-by-case". All calls are recorded

and CSOs can be held to account if they have given incorrect information. Post call, the CSOs must record accurate information in the information management system that contributes to a picture of the potential migrant or temporary visa holder. Due to the time it takes in many instances to customize policy to individual situations, providing accurate information competes with the drive of cost-efficiency, reflected in the CSOs' productivity objective, and expectations of quick information giving in CSOs and callers alike. One call resolution may run counter to customer-orientation depending on how much information the CSO believes they are required to give. Expressing empathy will sometimes compete with speed of call processing. If CSOs emphasise throughput the call cycle will be shorter, but the costs less. Call wait times will be lessened, which improves customer service generally, but not necessarily to the individual caller.

Employed for their pro-customer attitudes and bearing the duty of public service, CSOs have to manage their desire to help callers with their gatekeeping purpose. Many callers to the ICC are likely to bring their expectations of service created by Immigration New Zealand's own texts that encourage callers to approach the ICC for "information" and "advice and assistance". Some call expecting not only a good experience, but also that the CSOs know everything and have the authority to assist them achieve their aims. In the face of these expectations CSOs are required to manage maintaining a customer centric environment while giving accurate and often unwelcome information. Poorly presented and incomplete policy and inconsistencies between branches in policy interpretation and procedures hinders the CSOs' ability to satisfy all three drives, that is, locating and imparting complex information accurately, empathetically and quickly.

Like most frontline service workers, customer service officers perform emotional labour. The immigration experience can be fraught and about half the calls CSOs answer a day are of high emotional content. CSOs are required to produce the "proper state of mind" (Hochschild, 1983) in their callers, namely that they feel respected and valued and that the CSO has empathized with them. The CSOs' employer specifies how to feel and the behaviour required to express that feeling. The indications are that while these employees may derive a sense of personal accomplishment

from managing their emotions, they are at risk of emotional exhaustion (Zapf & Holz, 2006). Due to the high volume and the short duration of calls it is likely that most CSOs will usually only have the capacity for surface acting (Mulholland, 2002). Given the pleasure derived from helping callers the CSOs are likely to feel frustrated when they can only offer the superficial appearance that they empathize with their callers' plights. This can also lead to emotional exhaustion (Deery et al., 2002). Remaining positive throughout calls, as demanded by performance requirements, indicates CSOs will experience emotional dissonance in their work and therefore may suffer psychological strain. Hochschild (1983) suggested that the psychological costs of emotional labour would be reduced if workers had more control over the conditions of their work. Fortunately the CSOs have a degree of control over their interactions and are permitted to interrupt callers and they can terminate abusive calls. One of the customer service officers claimed the right to take her time over emotionally laden calls and considered her service was compassionate and effective as a result. Furthermore emotional distancing appeared to be employed by some customer service officers as a functional mechanism for coping with emotion work.

Some of the CSOs commented on the salary difference between CSOs and other warranted immigration officers in the rest of the organisation and how callers may view their status compared to that of the case officers. Despite the links the ICC manager had created between the ICC and the wider organisation through reporting predictable failure demand, with work add-ons such as providing immigration information on individuals to health boards and helping employers by identifying work visa holders, and a career path leading to employment in the processing branches including secondments, the CSOs appeared to feel separate from the rest of Immigration New Zealand. This was most obvious when the CSOs expressed their frustration at the inconsistencies between branches in their interpretation of the instructions and their procedures, failure to regularly update the ICC with information, and when case officers refused to deal with callers whose applications they were handling, or misuse the ICC by referring callers with whatever questions they had even if these fell outside its ambit of responsibility. These failures indicated that some INZ

employees may not appreciate the nature of the ICC's work and a difference in the way CSOs and employees in the rest of INZ view their clients. Separateness appeared to be accentuated by the stigma some CSOs felt was attached to call centre work so that they considered staff in other areas would not want to transfer there. It may be that many employees in the rest of the organisation are unaware of the full complexity of call centre work and the extent of the demands, tensions and contradictions that CSOs have to manage daily.



## Chapter 5: The immigrant representatives

### 5. Introduction.

The information in this chapter was obtained from semi-structured interviews with eleven immigrant representatives (IRs). Supplementary data included the Immigration New Zealand (INZ) website, other INZ data and documents that indicate the legal and business environment in which immigrant representatives operate.

The interview data indicate there are many similarities in the work experiences of customer service officers and immigrant representatives. Both CSOs and IRs act as gatekeepers differentiating those migrants who are likely to qualify for visas from people who are unlikely to qualify. Both groups have to identify their customers' needs and then locate, interpret, and apply law and policy to their customers' situations. Then they have to communicate the information clearly. Both have to interact effectively with global clients and therefore encounter language, cultural and gender barriers to effective communication. Like CSOs, the IRs' accounts indicated they deal with a broad spectrum of situations from the relatively simple to the complex although some IRs prefer to deal with cases at one or other end of the complexity spectrum. Both groups have to cope with inconsistencies in the implementation of policies and procedures. Both liaise between their clients and INZ case officers.

Both IRs and CSOs provide services to people who place a very high premium on permission to migrate to New Zealand (Controller and Auditor-General, 2009). This renders some of their mutual clients demanding, apprehensive, vulnerable and desperate. It also means IRs and CSOs can experience considerable pressures from clients to achieve their migration aims. Some clients will be unable to meet legal and policy criteria, and like CSOs, IRs are required to provide honest, objective, accurate advice. Clients may 'shop around' with IRs seeking advice that best fits their objectives and may continuously evaluate the performance of their chosen IR on this basis. Immigrant representatives are expected by some clients to ensure they achieve their migration aims. Even in what appear to be very strong cases it is not possible for IRs to guarantee applicants success

for many reasons. Often immigrant representatives manage the less straightforward applications and some applications fail. Like CSOs, immigrant representatives do emotion work when relating with clients and they also struggle with their own feelings when conveying or addressing decisions by INZ that appear incorrect or seem unfair. The weight of these pressures permeates the IRs' interactions with INZ staff including CSOs.

The data from both CSOs and IRs revealed there was sometimes a slight mutual antagonism between the two groups, created by their respective positions within the immigration system. As two immigrant representatives (IR3 and IR4) noted, it is important to acknowledge that IRs are often consulted when customers and their New Zealand contacts encounter problems and that the experience of repeatedly dealing with complex cases may colour their opinion of the Immigration Contact Centre.

Six key themes are presented (Appendix K). 'Negotiating the complex immigration system' reflects references by immigrant representatives to the complexity of New Zealand's immigration system and the challenges of navigating it, which in turn motivates INZ clients to seek expert advice and support. The immigrant representatives reported that sometimes the ICC (and branches) provided 'inconsistent, conflicting and inaccurate information' causing confusion and serious problems for callers. This also causes problems between immigrant representatives and their clients. The third theme 'try, try again' is about making repeat calls to the ICC that are in part a consequence of having received 'inconsistent, conflicting and inaccurate information'. 'Asking the right questions' is about the advantage expertise in the immigration industry gives immigrant representatives when obtaining information from the ICC, but it also refers to the importance of asking the right questions of clients, acknowledging gender, language and cultural variables that impact on communication and the need to establish trust in the relationship between immigrant representative and prospective migrant and/or temporary visa holder. 'Serious consequences of information' is a theme highlighting the importance that the information and guidance CSOs and IRs give has on the lives of their mutual clients. 'Using contacts' refers to the way some immigrant

representatives have developed personal networks within visa processing branches to find the information and advice they need.

### **5.1 Negotiating the complex immigration system.**

The theme ‘negotiating the complex immigration system’ parallels the CSO theme ‘communicating complex information’ from the perspective of the system user. It reflects frequent references by eight IRs to the complexity of New Zealand’s immigration system. Complex policy contributes to reassurance-seeking behaviour by migrants about their immigration situation and the client demand for IRs to identify and charter an appropriate course through the system and to support them throughout this passage so the clients might achieve their visa objectives.

*We try to focus on this is where you are at now, this is where we can get you to in terms of moving you forward and map out a pathway. (IR2).*

For the IRs the showcase for the complexity of the system was the immigration instructions. There was general agreement by the IRs and CSOs about this. The ICC also acknowledged the challenge of working with the instructions. For example, advertisements for customer service officers note that applicants are sought with the “ability to navigate complex policy information” (MBIE, 2014c). Two IRs pointed out that while the INZ website now made the instructions readily available to the public, the policy did not seem any more straightforward, particularly because there are far more policy options than 10 to 20 years ago. The IRs described immigration policy as vast and complex making it difficult to navigate even for seasoned IRs. IR9 remarked:

*Even people who are experienced in Immigration can be caught out by the subtleties of the immigration instructions.*

This can make the task of applying policy in individual cases very challenging, even formidable for new IRs, let alone for lay people. IRs can decide whether to handle cases over the entire complexity spectrum or to specialise. In contrast, CSOs are expected to deal with enquiries about all aspects of

immigration. This places considerable pressure on CSOs and may make it difficult for them to meet the high expectations and complex information requirements of expert callers like IRs.

It can take time to locate, read, interpret and then apply the instructions to individual circumstances especially because immigration policy changes frequently and sometimes with little notice. All the IRs emphasized how essential it is that the ICC provides accurate information and that this was more important than meeting call volume requirements. They also stressed the importance of CSOs admitting if they did not have the answers to policy questions. IR1 was pleased that recently CSOs had undertaken to find the information he sought and called him back and yet IR11 expressed frustration when new CSOs had to keep checking information with senior staff. In some respects CSOs appear to be in a catch 22-situation in their efforts to ensure they provide accurate information with some IRs expecting answers to take time to formulate and others expecting quick advice, albeit they know immigration policy is complex.

The majority of IRs appreciated the depth and breadth of knowledge CSOs were expected to have and acknowledged the difficulties they faced reducing complex information to brief exchanges.

*The ICC have got to be dealing with people who want advice on residence policy, temporary entry policy, being unlawful in the country, deportation notices, etc., etc., and they have got to be an expert in all of those things. It is a very complex area they are giving 30 second sound bites of advice on. (IR2).*

While a relatively new IR said she found the ICC helpful for guiding her to the correct sections of the instructions this assistance differs from a full explanation of the policy and supporting examples sought by other IRs. IR11 said that CSOs tended to reiterate the policy criteria rather than provide information about how it was interpreted in the visa application processing branches. This supported the CSOs' accounts of how they dealt with their difficulties interpreting the Long Term Skills Shortage List by simply reading the text to callers. IR2 noted that very rarely would his

employees contact the ICC about policy because from his experience the CSOs did not have the depth of knowledge required.

While IRs 2 and 4 considered the ICC served as a convenient source of information about the progress of visa applications and the contact details of the case officers considering them, they did not believe the call centre model, with its quick exchanges, accommodated the complexity of the instructions and the sometimes difficult process of interpreting these. Their assessment may be influenced by their role as licensed advisers handling reconsideration requests, appeals and complex applications including cases where they provide long-term strategies to navigate pathways for potential migrants who do not immediately meet visa criteria. Another licensed adviser, IR10, considered *“really the policy is pretty black and white. If you meet it, you pass, if you don’t, you don’t.”* Asked to comment on this IR8 agreed the policy was straightforward to apply when applicants clearly met the policy, but it became problematic when individual circumstances did not satisfy every requirement. IR1 mentioned the challenge of shaping clients’ situations, such as their job descriptions, in order to meet skilled migrant policy and thereby clearly differentiated the advice and assistance provided by IRs and CSOs.

IRs 1, 2, 3, 4, 9 and 11 indicated the complexity of the immigration system was often the reason for potential migrants to consult an immigrant representative.

*Everybody likes to think they can do it themselves, whether it is painting their house or dealing with immigration. Then when you get down to actually starting the project you think, “Oh my, this is bigger than what I first anticipated” or more complicated or whatever it might be. That’s when they might go to the ICC and then they get even more confused and then end up coming to a professional. (IR4).*

IR1’s experience was that clients sought his services in order to have face-to-face contact because this allowed them to visually gauge his credibility when he provided an evaluation of whether they met immigration policy.

The complexity of the immigration system creates doubt and people seek help to understand the instructions, other rules and procedures that apply to their particular situations. IRs 2, 6 and 10 and CSOs commented people seek reassurance about their eligibility for visas and whether their documents are satisfactory. Face-to-face interaction provides the opportunity to examine documents to assess the claims customers make about satisfying policy. CSO3 had mentioned that some callers never feel confident about the visa application they have prepared because they do not have the opportunity to seek in-person assessment of their documents by INZ staff before submitting them. Walker and Craig-Lees (1998) recognised services where technologically mediated transactions could attract negativity and these included situations where customers associate purchase with a high level of risk and believe the risk is reduced by direct personal contact. Certainly the process of applying for a visa, particularly a resident visa, carries for many people significant financial and emotional risk and this may account for those callers to the ICC who say they would prefer to see an adviser (including immigration officers) in person.

The IRs' accounts indicated migrants' needs are not always met via call centre interactions. IRs 2 and 10 commented on the difference between the "transactional" manner with which people are treated when making telephone enquiries compared to the greater care shown when immigration officers used to deal with many information requests face-to-face. IR2 said in their business they encourage face-to-face consultations with clients because it allows them to do *"those things you know that you can't do in a 60-second phone call."* Drawing on his experience as an immigration officer in a busy Auckland branch over 20 years ago, IR2 recalled officers would sit with prospective applicants, provide them with information leaflets and take the time to answer all their questions about policy. IR10, another long serving IR, was adamant that customers had received a better service with face-to-face contact. He considered adoption of the private sector 'user-pays' practice by the public sector had weakened the obligation to provide a quality personal service so that now *"you just get what you pay for. Nothing more, nothing less."* In this respect the

traditional public service ethics of helping people and of working altruistically for the public good contrasts public service with private sector work (Jorgensen & Bozeman, 2002).

Burgers et al. (2000) noted that customers expect call centre workers to have the authority to deal with questions and IR4 said callers anticipate that CSOs will give policy information confidently. This is difficult when the way applications are assessed can vary from branch to branch, officer to officer (Controller and Auditor-General, 2009). IR2 considered that a level of complexity gets lost in translation between the telephone call and the reality of the actual application process. He noted that people expect information they receive from the ICC to be reliable and that what eventuates after they have lodged their application will mirror the advice given, however often that is not the case. He believed this is because the CSO is not the person who processes the application and one person's interpretation of policy may not be the same as another's. IR10 observed there could be two or three changes of case officer during the processing of one application resulting in multiple assessments of the same information until a final decision is made. To add to the mix, INZ case officers have a significant degree of discretion when deciding visa applications. IR2 suggested that in an ideal world all CSOs would have the opportunity to work in a processing branch and IR1 proposed that the ICC recruit case officers to combat this disconnect. This would not address the problem of variation between branches and immigration officers in the way applications are assessed. The foregoing makes it unrealistic to expect CSOs can confidently predict the likely outcome of following their advice. This makes it all the more confusing for callers faced with intricate policy and immigration decisions including deciding whether to lodge an application.

The Martin, Jenkins, & Associates Limited's Review (2014) confirmed that INZ intended to make it easier for migrants to access the immigration system and to identify whether their applications are likely to succeed, suggesting uncertainty about visa eligibility due to complex policy remains a problem. In the meantime the demand for immigrant representatives to interpret

policy, provide advice, support migrants in their immigration decisions, and to liaise with INZ on their behalf, continues.

## **5.2 Inconsistent, conflicting and inaccurate information.**

Nine IRs suggested the ICC sometimes provides ‘inconsistent, conflicting and inaccurate information’ that causes confusion and problems for callers and motivates clients to seek expert support. The IRs also mentioned that when information from the ICC conflicts with the advice they provide this creates problems in their client relationships. IRs located the reasons for these problems both within the ICC and in the wider organisation and some IRs identified them as an inevitable consequence of the ICC’s interaction with global customers and the serious consequences of immigration decisions for individuals.

Inconsistent and inaccurate information can occasion immense frustration for IRs. They operate in a competitive market and a strict regulatory environment and need to feel confident about the advice they give to their clients. IRs prepare applications and appeals to meet INZ visa and appeal body deadlines, which can further increase the pressure to obtain clear and correct information. Four IRs recounted instances where they had telephoned the ICC and received two or more different answers to the same question.

IRs 5 and 9 also remarked on the high level of frustration their clients experienced having reportedly called the ICC several times and encountered very long waits to receive several different answers to the same question leaving them confused and disheartened. IR6 reported that one of their clients consulted them after her visa application had been declined having followed a process, which she said was suggested by a CSO. IR9 cautioned that until an individual caller’s situation was fully unpicked it was not possible to decide where the responsibility for incorrect information lay. Sometimes the caller may not have described their circumstances accurately or the CSO may not have fully understood the caller’s situation. The IRs’ accounts of inconsistency and inaccuracy in relation to specific cases indicated their frustration was motivated by an underlying expectation



that government services will be accessible and provide robust advice (State Services Commissioner, 2007). The provision of inaccurate and inconsistent information has potentially negative consequences in terms of INZ's objective to bring the best people to New Zealand. IR2 noted that frustration due to getting different answers each time they called leading to confusion meant some callers would decide the process of applying to stay in New Zealand was too hard.

The IRs presented various reasons for inconsistent, conflicting and inaccurate information provision by the ICC. Four IRs (4, 6, 9, 10) believed it was symptomatic of inconsistency within the wider organisation. For example, IR9 observed the immigration instructions contained contradictions that could result in conflicting advice and gave a pertinent example where:

*By using the term 'contract for services' in the skilled migrant instructions, essentially what Immigration are saying is this [policy] is not for self-employed people, but if you are an independent contractor it is okay, which is clearly a contradiction. Really immigrants shouldn't have to deal with that crap.*

IR2 opined inconsistent information from the ICC might be caused by the complexity of the policy information and predicted there would always be inconsistencies. IR6 discussed problems arising from differences in policy interpretation when it is applied to the specific circumstances of applicants. Two people could interpret policy differently resulting in conflicting information.

IRs 4, 9 and 10 considered a lack of training, immigration knowledge and inexperience resulted in inaccurate information provision by CSOs. IR4 (a licenced adviser) said his comments applied to immigration officers in general. Such judgements may influence the attitudes communicated by IRs when interacting with CSOs and this could hinder communication. Some CSOs mentioned feeling more under pressure to perform when dealing with licensed advisers. It seemed that IRs were unaware the CSOs were warranted immigration officers and of the extensive training that is invested in them because of the assumptions they made about the CSOs' credentials.

IR2 considered that in comparison to the relative anonymity, and therefore limited accountability afforded by the call centre, face-to-face contact with customers created in

immigration officers a greater sense of obligation to provide accurate information. The call centre literature contains accounts of agents giving half-hearted responses, minimising help, closing off options, cutting calls short, and disconnecting calls (Bolton & Houlihan, 2005; Copas, 2004; Houlihan, 2001). The research consistently emphasises the satisfaction agents derive from helping people (e.g., Frenkel et al., 1999; Healy & Bramble, 2003) so the impetus for such behaviour is not normally a lack of concern for the customers. Rather it is usually interpreted as resistance to unreasonable pressures such as impossible call volume targets (Bolton & Houlihan, 2005; Copas, 2004; Houlihan, 2001). In the ICC calls are recorded so poor behaviour or inaccurate information can be traced to individual CSOs and remedial action taken. The indications are that inaccurate information provision is neither deliberate nor caused by lack of accountability.

The IRs identified factors external to INZ as the causes of inconsistent information. IR5 noted immigrant callers were often hampered by English language difficulties, and remarked this created potential for misinterpreting information provided by the CSOs. Misunderstandings through clients listening to hearsay could also result in claims of inaccurate information.

Inconsistent, conflicting and inaccurate information, in part, drives INZ clients to seek expert advice however it can create problems between clients and immigrant representatives. An IR from a Citizens Advice Bureau reported a situation where information from the ICC to a client contradicted her advice. Confronted with the discrepancy by the annoyed client, the IR checked with a contact the Bureau had in INZ and her version was supported. IR1 mentioned a situation where he was out of the country and his client had called the ICC because his work visa was about to expire. The client was advised to apply for a further work visa whereas his family's resident visa application had been approved in principle and that meant there was no need to seek a further work visa. The effect was to call into question the licensed adviser's advice. *"I got a panic call overseas saying what have you done to us?"* The clients questioned why they had paid him to represent them. He said he felt undermined and highly annoyed the clients had to choose whether they believed him or the CSO employed by the organisation that decides visa applications. As IR10

stated, most clients tend to have a deep respect for government authority making it difficult for IRs to persuade them to believe contrary information. IRs can be confronted with having to justify their advice when this differs from the information provided by the CSOs. IR1 decided to counsel all his clients not to call the ICC.

IR2 observed that IRs need to instil trust in their clients so that they do not feel compelled to check the advice they provide with the ICC. The Code of Conduct 2014 (Immigration Advisers Authority, 2014a) requires licensed advisers to maintain a relationship of trust with the client. Achieving this appears to be a challenge in some situations. Given the complex policy, inconsistencies in the immigration system, and the high personal investment in visa applications, it is understandable, and possibly a good safeguard, that even when there is a trusting relationship between IRs and their clients, the latter may seek alternative sources of information to check if their visa pathway is likely to be effective.

The accounts from the IRs indicated the ICC was reducing instances of inconsistent information provision. IRs 4 and 5 said they called the ICC for confirmation about policy indicating they regarded the CSOs as a reliable source of information. The IRs observed the specific line for advisers, lawyers and others exempt from licensing had resulted in improved quality of information. IR5 said she was now ninety nine per cent sure she would receive good advice and had heavily relied on CSOs when dealing with highly complex cases such as a refugee status application. Whatever the cause, inconsistent, conflicting and inaccurate information naturally occasions immense confusion and frustration for callers to the ICC. For immigrant representatives with tight deadlines to meet and the need to provide accurate information and advice, it can threaten the confidence their clients have in them.

### **5.3 Try, try again.**

The theme 'try, try again' parallels an aspect of the CSO theme 'frustrating calls', namely persistent callers. IRs found making repeat calls to the ICC draining for both themselves and their

mutual clients. The IRs identified that complex policy, inconsistencies in the immigration system, the diverse nature of the client base, client reliance on hearsay, and quick exchanges appeared to contribute to repeat calls. Other contributing factors may be the ongoing contact between IRs and CSOs and that sole traders characterise the immigration industry.

Six IRs talked about making multiple calls to the ICC largely as a consequence of the inconsistent, conflicting and inaccurate information they said was received. The IRs drew on their expertise to decide whether a CSO's answer was likely to be correct. If the information was evaluated as incorrect, immigration representatives telephone the ICC again or access other sources of information within INZ until they have an answer that seems credible. Six IRs spoke about calling the ICC more than once regarding the same issue. IR6 said:

*You almost wonder whether...someone at the Contact Centre is reading a completely different policy than what we are and how they interpret it... Then I will re-read exactly the part of the policy.... I will ring back.*

IRs noted that their clients often made repeat calls to the ICC. IR5 said that some callers persist because the answer is not what they want to hear, a practice the CSOs had observed. IRs 1, 4 and 5 noted that people shared information with their friends and communities and if accounts did not match they would call the ICC again.

*And it's the hearsay. It's other people within especially the Thai community – really bad - because they talk amongst themselves and “no if you do it this way you don't have to do that” or you know “because my employer said I just don't have to do this”.... Then they'll talk to somebody else and they will say, “No, it is such and such” so they will ring back and they'll ask the same question again.*

IR1 reported he had to explain to his clients that hearsay was incorrect when presented with advice that conflicted with his. The INZ Annual Customer Satisfaction Survey 2012 (MBIE, 2012a) found family and friends were rated as the most useful source of information about life in New Zealand by temporary visa and resident applicants. IR8 mentioned that callers with no or little English language

skills call back because they do not understand what was said and IR2 believed repeat calls were inevitable consequence of trying to communicate and understand complex information in short bursts. Agents in Gilmore's (2001) case study reported that many repeat calls were made because customers felt their calls were rushed or they did not understand the information given.

There may be other reasons for some repeat calls. IR11 remarked that many IRs work alone. Martin, Jenkins, & Associates Limited (2014) identified that most licenced advisers are sole practitioners. Three of the five licensed advisers in this study were sole traders, the lawyer participant worked alone and the participant from a community law office also operated alone at times as did the Settlement Support Co-ordinator and Electorate Secretary, making a total of nine IRs. The isolation in which some IRs work may increase their reliance on INZ staff for information and may help explain why IRs make repeat calls to the ICC to check advice. There is no one else to discuss legal, policy and procedural information with. Furthermore, given the competitive nature of the immigration industry, IRs may be wary of revealing to their peers unfamiliarity with aspects of the system.

The predicament of sole operators contrasts with the significant social, technical and informational resources and support CSOs enjoy. When an IR, who worked alone, sought information on the Residence from Work category he persisted until he found a fourth person who gave an answer that matched his research although by that time he was beginning to doubt himself. Given these exhaustive efforts and his isolation it is understandable that even an expert caller can become uncertain, bewildered and frustrated. At the same time the opportunity to confer with other IRs within the same organisation instils confidence to check information. For example, an IR working for a Citizens Advice Bureau noted:

*We get two or three types of answers from different Call Centre persons.... Because what we do now, we call once then if we think that it is not according to what we think or our experience didn't show that or we discuss the recording and they say no I have got this type*

*of case and it has happened that way. So we call another time and we get another person and then we get another reply.*

IR1 noted CSOs were now more willing to check their advice when asked to, but not all IRs agreed. IR5 recalled the atmosphere between her, a CSO and a senior officer was tense when she queried the information.

*She (CSO) went to her supervisor who clarified that what she was telling me was correct...I must make the point this was not the Immigration Advisers' call line it was the other one, all right? He came in and spoke to me and he said "No that's correct". I said "Have you got one of the forms in front of you for the Extension of the Working Holidays Scheme? "Yes". So I said "Under the health" and basically I was so mad, I basically said to him where it states if you are here more than one year yes, yes you need a medical. He said, "That's what we are arguing about". "No hang on read the next paragraph down – except Working Holiday Extensions." "Oh, oh I better go and check this with my superiors".... I was absolutely gob-smacked that they didn't know that.*

The research indicates that in many cases reluctance by the CSOs to double check information may be due more to the ICC emphasis on meeting their productivity objectives than an unwillingness to help. Three of the IRs indicated that repeat calls were a way of checking advice without getting into a heated exchange. CSOs are encouraged not to escalate difficult calls to senior colleagues, which means if there is disagreement the IR must try to get the correct information from the same CSO, potentially making the exchange tense. IR1 noted that with some CSOs the approach was *"It'll be my view or not at all."* Russell (2009) found that call centre employees interacting with expert callers with an investment in the information provided, scored their workload low in manageability because calls could become stressful if there was a disagreement. Technologically mediated communication increases the social distance between the parties and in part 'disembeds' the caller-worker interaction (Korczynski, 2002). In turn this facilitates the break down of social niceties and the humanity of interactions when there is discontent and disagreement. There are several factors

that guide the behaviour of the actors in the ICC context. These include a code of conduct IRs must adhere to and the exacting standards CSOs must comply with. Furthermore, unlike the one-off encounters associated with many call centres, CSOs and IRs may well come across one another again (especially the CSOs in the business-to-business team) and so the release of tension that call centre staff and customers may bring about by voicing their dissatisfaction is not as available to either IRs or CSOs. While the temptation will be there at times to openly express frustration both parties appeared to be very controlled when there were difficulties with policy interpretation and other problems. Hence IRs 1, 6 and 8 seemed to take an intentionally detached approach when they encountered information that did not seem right. Rather than entering into a debate IR6 said, *"I will just accept what they say because there is not much point in arguing with them. Just take what they say...I will ring back."* Faced with conflicting information some immigrant representatives consult their contacts within INZ.

Repeat calls are inevitable in some types of more complex call centres (Edell, 2007) and in the immigration business perhaps they should be accepted as a consequence of the complex nature of immigration policy, the significant financial and emotional investment applicants have in decisions, and the language and cultural difficulties some callers encounter in their interactions with the ICC. For IRs repeat calls are a way of double-checking information without pressuring CSOs by directly questioning their advice. With language difficulties and cultural differences it is much harder for many layperson callers to the ICC to question information. IRs are more likely to know what questions to ask, to whom in INZ to refer questions, and some IRs have the confidence to persist with information seeking, contacting INZ management if necessary.

#### **5.4 Asking the right questions.**

Related to the theme of 'try, try again' was 'asking the right questions'. This theme concerns the IRs' promotion of their expertise. It is also about the responsibility IRs and CSOs share to ask

their global clients appropriate questions so they can provide information and other services that meets their needs. Knowing the immigration terminology helps IRs frame questions to the ICC.

*For me to get it [concerns, questions] across is no problem, but for general Joe Blow who doesn't necessarily know all the terminology and all the bells and whistles that go with it, it can be very difficult. (IR4).*

Four IRs argued that due to the complexity of policy and the obvious benefits of understanding the immigration system, migrants were better off using the services of IRs than contacting the ICC themselves.

The CSOs emphasized how it was important to ask questions to tailor information to meet the callers' needs in order to satisfy call-handling targets. Immigrant representatives too must try to gain a sound understanding of their clients' situations in order to provide a professional service.

*Frequently with clients from some cultures you have to explore the issues with them to get all the little details that will make all the difference because immigration instructions have so many caveats. (IR9).*

IR11 noted that it is easy to make mistakes if you do not take the time to fully explore the client's situation:

*I said, "You are not going to get a visa to work in the freezing works. There are Kiwis out there looking for jobs. You won't get this renewed" and then as I was sort of saying good bye to them I said to the partner, who could hardly speak any English, "So I expect you are going back to the Islands". She goes "No, no I am a Kiwi" in basically very, very poor English and I'd just made the assumption.*

But for a chance remark the family might never have known there was an alternative route to gaining a resident visa. This example shows how important it is to explore all the potentially relevant aspects of clients' circumstances and how easy it is to make incorrect assumptions. IR2 said their staff must cross check the information they collect from clients with another employee to reduce the chance of missing important information. Probing to obtain the relevant facts takes time



that the CSOs do not have. In addition, IRs 6, 9 and 10 stressed the benefits of reading body language when checking whether the client has understood policy information; an option not yet available to the CSOs.

An IR working at a Citizens Advice Bureau noted that due to privacy legislation, staff could not always obtain information on behalf of clients unless they were included on the applicant's visa application form as a contact so they encourage clients to call the ICC direct. The IR said that for some callers with language difficulties, their concern is how to convey that to the CSO. They need to be able to understand the dial options and then know how to request Language Line. In her experience callers with difficulties speaking and understanding English feel uncomfortable and nervous. Communication difficulties will be exacerbated when callers with English as a second language over estimate their skills. IR5 noted:

*Most of the clients that I deal with think their English is fine.... You can say something to them and they will take a totally different meaning out of it unless you can actually clarify.*

An IR recalled an exchange about a simple matter between a Citizens Advice Bureau client and a CSO. The IR reported the CSO refused to allow her to participate in the conversation with the client, which she found irritating because the client was happy for her to be included. The client misinterpreted the information believing his passport had been returned to him by INZ. The CSO had said INZ was waiting for him to send the passport. Language Line was not offered because the client spoke English. The IR explained that:

*Speaking English means they work here. They have been here for more than three or four years, so they work in the supermarket so they know this type of English, but when someone says you have to send the passport here and it will take this time and then the Immigration Officer will stamp it, send it back. Those types of things they don't understand.*

Victoria University's Centre for Applied Cross-Cultural Research's (2007) study into the Information Seeking Behaviour of Migrants found their survey respondents had a lower level of English language comprehension than they thought they had. Requirements to achieve a clear

understanding of callers' concerns include knowing how to identify when English as a second language is a barrier to communication, and acknowledging that diversity due to gender, age, disability, migration status, faith, language skills, geographic location and cultural differences in norms and values, has an impact on communication. The Office of Ethnic Affairs' guide for policy writers, *Ethnicity Matters* (2012), outlined broad values ethnic communities might identify with including the concept of family and hierarchy. IR5 described a scenario that would prove trying to the caller and the CSO:

*You have a Pacific Island family together. You have got Dad, who is the principal, so he has got all the questions, but he doesn't want to talk on the phone and he doesn't want to fill out forms, but he wants the answers. So it is Mum who gets on the phone and she is getting – you know when she is talking to the Contact Centre she is getting “Ask that, ask that” you know all in a different language so you know it's...you can see where the frustration and the misinterpretation comes in.*

IRs 8 and 9 pointed out that in some cultures it would be considered rude for a caller to say they do not understand what an official has told them. Clause 2b of the Licensed Immigration Advisers Code of Conduct 2014 (Immigration Advisers Authority, 2014a) stipulates that immigration advisers must “Acknowledge the cultural norms and values of clients” and the Immigration Advisers Authority provides resources on cultural diversity and values. While the CSO Position Description requires CSOs to have “highly developed interpersonal skills including the ability to interact effectively and appropriately with others of differing cultures, gender, age, or backgrounds”, there is no specific mention of the need to recognise the cultural norms and values of clients when providing advice (Department of Labour, 2010, p. 4). While the relationship between a client and an IR is different from the relationship of caller with a CSO in many respects, the complex forces that come into play during the process of questioning, understanding and advising a client are similar. Even when there is no apparent language barrier it can be a struggle to understand what information a caller requires. CSOs had commented on the need to spend time to understand a

caller's situation in order to provide useful information and the challenge of achieving this within their average call-handling target of 5.30 to 8.00 minutes. Several IRs also emphasized how critical it is to take time with clients. IR9 estimated that provided he can communicate clearly with the person and

*I can ask the right questions and we can get around any cultural misunderstandings because those happen, at least an hour.... and when there are language difficulties and you need a translator, really to get the actual truth, you know, the hard facts and any subtleties worked out, it is difficult. You need an experienced interpreter for that.*

*Then you know you are really looking at orders of magnitude more times in some cases. In some cases you don't actually find out what you need to know until days down the track.*

Perhaps because the prize of gaining a resident visa is so high it can take *days down the track* for IRs to build trust with clients so that all the required information is obtained, especially when there are language and cultural differences. IR9 also mentioned the importance of using an experienced interpreter if the client had English language difficulties. He said asking the client to repeat back to him what advice he has given quickly indicates whether they have understood. The care and attention to detail by this IR and the time he is permitted in order to obtain information from clients contrasts markedly with the CSOs' average call-handling time targets.

The complications involved in communicating important information about immigration law, policy and procedures are considerable. For many clients the information from the CSOs as government officers will carry a great deal of weight.

*The people who call in are quite often people who will accept any government authority as being true blue so they take it as fact and they go along and follow whatever instructions or advice they were given. (IR10).*

This makes it even more important that the information provided is correct. Both IRs and CSOs need to ask pertinent questions to obtain information so they can tailor their advice to meet the circumstances of the client.

### 5.5 Serious consequences of information.

The theme ‘serious consequences of information’ was identified in 10 of the 11 IRs’ interviews. It highlights the importance that information given by the ICC has for callers and for New Zealand in its bid to attract quality migrants. It parallels a sub-theme in the CSO data of ‘empathy versus accuracy’, namely the CSOs’ awareness of the significance of the information they provide on callers’ lives. Immigrant representatives must also ensure they provide accurate information. The significance of immigration matters, the stressful nature of the application preparation and assessment process and the harmful consequences of incorrect advice for individuals mean that emotion work is a large part of the IRs’ role as is the requirement to abide by their legal and ethical obligations.

All the IRs linked the seriousness of immigration issues to the importance of giving and receiving accurate advice. IR9 stressed:

*The information and advice that someone gives can have a direct and long lasting impact on someone’s life and one needs to be well versed in policy...These are life-changing decisions we are talking about here.... It can’t be overstated I think about the impact bad advice can have.*

The same can be said for the advice immigrant representatives provide, some of which is likely to be based on information from the ICC. IR1 stressed that CSOs should never “ad-lib” and that they must check the information held on individuals by INZ before giving advice. The IRs’ competence and credibility may be at risk if CSOs provide them with incorrect information and their concern is likely to make an impact on the tone of some calls. IR2 noted the information provided by CSOs has important implications:

*This is about saying I am sorry but you are not eligible, you can’t live in this country.*

*That is a big deal. (IR2).*

IRs remarked the information CSOs give influences decisions about whether to migrate and one pointed out that New Zealand is the fifth choice of top migration destinations. These points make it

all the more important that the ICC encourages migrants without giving them false expectations. For these reasons IRs suggested experienced case officers should work there; it should not be a place where employees first learn about immigration. These statements spotlight the importance accurate information provision assumes in public service call centres (Anderson et al., 2006), as well as the additional challenges CSOs face, namely empathetic service provision when handling stressful calls from people concerned about life-changing matters. The psychological impact on the CSOs did not seem to warrant much consideration from IRs however they were vocal about their own emotional experiences.

IRs may be the first point of contact for someone with a valuable contribution to make and who is considering migrating to New Zealand. They could also be the first port of call for people in desperate situations such as those who are unlawfully in New Zealand who wish to regularize their status.

*In the immigration context quite often people are desperate and they will do whatever they need to do or think they need to do to get them across the line. (IR2).*

The vast array of situations that clients seek assistance with makes equally wide ranging demands on IRs in terms of what the Immigration Advisers Authority (2014d) calls the professional responsibility for “client care”. Immigration cases can involve life and death situations and IR may feel responsible for achieving their clients’ aims even though this is beyond their authority.

*I rung and I said “I have a woman that has got an application in to extend a visitor’s visa and it has just come to light that she cannot return home because she would be locked up and killed. That is the intention. She is a political refugee.” Amazing and scary actually. Very, very serious situation yes. (IR5).*

The IR interviews indicated that some clients expect their representative not only to help them negotiate the immigration process more easily, but also to ensure they achieve their migration goals. *“The concern is always about getting their application approved at the end of the day” (IR2).* Even in what appear to be clear-cut cases it is not possible for IRs to guarantee applicants success.

There are factors external to the customer that can affect applications such as complex policy and the high degree of discretion in the immigration system, and changes in policy from the first consultation to when a visa application is ready to be submitted. Sometimes migrants might believe the immigrant representative may be able to influence the immigration decision-making process (Martin, Jenkins, & Associates Limited, 2014). Advisers are not permitted to promote that they may have special access or influence.

Like the CSOs, immigrant representatives have to cope with the effect unwelcome information, processes and decisions to decline applications have on them and their clients. This involves information-giving and emotion work. Sometimes immigrant representatives are consulted after migrants have submitted visa applications that have not proceeded as the migrant hoped. IR3 recounted struggling to explain at length to people, who had high expectations of having their resident visa application approved, why their qualifications did not meet the policy requirements or why INZ had decided they had not demonstrated the ability to successfully settle in and contribute to New Zealand. She (and other IRs and CSOs) also reported the difficulties of dealing with New Zealanders who seemed to consider obtaining a resident visa for their partner a mere formality and became indignant on discovering this was not the case. There are times when there is no way forward for clients and IRs have to cope with their clients' reactions and questions. IR4 mentioned one of his clients said she was told by the ICC she had a valid visa. She had held an interim visa, but a subsequent decision to decline an application cancelled that visa. It took some time to deliver the bad news because the client preferred not to believe she had been unlawfully in New Zealand for months. This echoed the dilemmas of CSOs when they communicate unwanted information. The symptoms of the pressures IRs experience are bound to permeate the content and tone of their interactions with INZ staff including CSOs, investing exchanges with tension.

Many cases handled by IRs require ongoing contact with their clients for some time so unlike the one-off exchanges many CSOs have with callers, immigrant representatives often develop a connection with their clients. This may increase the struggle IRs have when conveying

policy information and requests and decisions by INZ that do not seem fair. IR5 found it very difficult to tell a client that she was not in an acceptable state of health because she was pregnant. IR8 mentioned people who have worked in New Zealand for 10 years and would like residence for themselves and their families, but do not qualify because they do not meet the English language requirement. IR8 also felt for the international students who invest significantly in New Zealand by way of student fees, but cannot find jobs to support their resident visa applications.

It is hard to overstate the personal and public consequences the information provided by CSOs and IRs has. The IRs stressed the need for accuracy on the part of the CSOs, but the same applies to the advice imparted by IRs. Both IRs and CSOs have to cope with the emotional fallout when information or decisions are unfavourable for their clients and both groups wrestle with decisions that do not seem fair.

## **5.6 Using contacts.**

Eight of the 11 IRs interviewed reported they had cultivated connections with branch managers, immigration managers, case officers and technical advisors who they could contact about law, policy, procedure and their clients' cases. While the organisation preferred customers to make contact through the ICC, individuals within INZ had allowed informal knowledge networks to develop in response to approaches by IRs. For two IRs, the Electorate Secretary and the Citizens Advice Bureau CAB Language Link Interviewer, the networks appeared to be formal having been established by people at managerial level in both organisations.

Seven IRs said they now contacted the ICC rarely, mainly for technical assistance with the INZ website, for visa application status updates, and the name of the case officers dealing with their clients' applications. While some IRs said they contacted the ICC for policy information, several (e.g., IRs 2, 4, 11) stressed they would not due to the incorrect or inconsistent information they received.

*I would have to say that I never contact them to ask them about policy or what a solution is because I know that nine times out of 10 the answers you get from the officers at the Contact Centre are often not worth the paper they are written on. (IR4).*

IR4 was asked illustrations and for accounts from his clients who he said had similar experiences, but he was unable to provide immediate examples. His comment does indicate the level of antagonism between the two groups. IR4 said he had taken up with the ICC manager situations where he considered the advice he was given was incorrect and reported the reception had been positive. He said he mainly used the ICC for application status checks and the name of the case officer. One IR did not contact the ICC because she considered her role as a Settlement Support Co-ordinator (a service offered by a division of INZ), was not as well understood by CSOs as it was by case officers. IR11 noted he had developed trusted contacts within INZ who gave him insight into what was required to get applications approved.

Despite several IRs asserting they no longer contacted the ICC at all, their comments about the improved wait times and information quality, indicated they still engaged with the ICC. In October 2010 a free phone number was introduced for licensed immigration advisers and those who are exempt under the Immigration Advisers Licensing Act (2007) from the requirement to hold a licence. There had been since September 2011 a business-to-business team answering calls and emails from advisers, lawyers, community law centres, and others exempt from the requirement to hold a licence. The shift to match expert callers with a dedicated team has gone a long way to meeting the need for officers to have in depth legal, policy and procedural knowledge to serve IRs. It is this need that prompted IRs to develop their contacts within INZ in the first place.

One of the two licensed immigration advisers newer to the immigration business than the other three licensed advisers indicated they relied heavily on advice from CSOs. These two newer IRs said they now interacted with CSOs in a relaxed way to the point they would share a joke. Both these IRs worked alone and their appreciation of the friendly banter they had with the CSOs may indicate they otherwise felt isolated.



*They have been real, absolutely brilliant to deal with.... They sort of will joke and carry on with you. (IR1).*

The newer IRs had less exposure to the problematic relationship between INZ and immigration consultants that existed prior to industry regulation however there also appeared to be a thaw in the relationship between more experienced IRs and CSOs with compliments given about reduced wait times and on the better quality of information provided. IR2 noted in regard to the line answering calls from the general public:

*The queues aren't as long as they used to be so they are answering the calls quicker, they are answering them faster and in general terms they have people who are pretty well customer service focused.*

Eight IRs said the ICC's service had improved. Clearly the efforts made by the ICC to ensure a better service were showing results.

## **5.7 Conclusion.**

The IR data supported some of the literature's findings about customer experiences. The criticism about the provision of inconsistent, conflicting and inaccurate information the IRs claimed they and their clients received from the ICC, together with the serious consequences of poor advice, underscores the importance of accurate information provision by public service call centres (Anderson et al., 2006). There were the usual complaints about long waiting times and having to make repeat calls, albeit the latter appear inevitable and for some IRs they served a useful way of handling calls where information provided by the ICC appears incorrect, enabling the IRs to avoid openly challenging CSOs. Migrants checking information given by both CSOs and IRs serves as a useful safety net given the complexities of and the changes and inconsistencies in the immigration system. The IR-reported disconnect between the advice given by CSOs and the actual experiences of the clients when they came to have a visa application processed, was partly attributed to the separation of the ICC from the wider organisation in that IRs assumed correctly that most CSOs had

no experience in processing visa applications. The capacity for different interpretations of the same policy and significant discretion in assessment and decision-making by INZ also accounted for the disparity resulting in CSOs being unable to give definitive advice. This in turn creates difficulties for the IRs who are accountable to their individual paying clients for providing accurate information. This contrasts with the relative lack of liability CSOs have for providing inaccurate information.

Like the CSOs, the IRs struggled with understanding the immigration instructions. They appreciated the challenge for the CSOs to compress a difficult interpretive process into brief interactions. Aware of differences in the interpretation of immigration policy between branches and over time, immigrant representatives were not satisfied with answers that merely repeated criteria. These expert callers seek 'expert immigration officers' to ensure the validity of the information and advice they provide. This may require in depth discussion and research, which clashes with the call centre model of work organisation where generalist CSOs try to meet the complex information needs of specialists within 7:00-10:00 minutes. For this reason IRs had developed personal contacts in the wider organisation.

The emotional and financial investment in immigration applications coupled with policy that is unclear and/or complex causes migrants to seek reassurance from knowledgeable people who they can see in person to assess their visa eligibility and to check their application documents, a service the ICC can not provide. Some of the IRs lamented the introduction of private sector practices to the public service had eroded the obligation to provide a quality service primarily "motivated by the content and significance of the tasks carried out" (Jorgensen & Bozeman, 2002, p. 68). The IRs appeared to fill a demand for personal service that the public sector used to provide.

In the main Bolton and Houlihan's (2005) descriptor 'functional transactant' best fitted the IRs. Appreciating the limits of the CSOs' authority the IRs appeared to seek efficient service (in addition to accuracy), rather than the impression of customer sovereignty. Bearing in mind Bolton and Houlihan's (2005) notion that customers adopt a range of stances in their interactions with

service providers, the role of ‘moral agent’ seemed the most appropriate designation when the IRs discussed the serious consequences for their clients of inconsistent and inaccurate information. This is where the humanity and individual predicaments of the callers are emphasized. When IRs expressed their enjoyment of interacting with CSOs in a friendly and humorous manner they acknowledge that they are engaged in a social activity and that both they and the CSOs are capable of resisting the constraints imposed by the labour process of the call centre.

Like the exacting customer expectations of call centre employees identified by Sun and Li (2011), the IRs could be rather demanding of the CSOs despite their awareness of the complex immigration system and the culturally and linguistically diverse characteristics of the client group that can impede clear communication. The unrealistic expectations some IRs had of receiving instantly accurate information from CSOs may have been influenced by their experience with commercial call centres. In this light they can be regarded as taking the stance of ‘mythical sovereigns’.

The IRs’ accounts about their client relationships indicated that winning and keeping their clients’ confidence and trust is not as straightforward as the Licensed Immigration Advisers Code of Conduct 2014 implies. The stressful experience of applying for visas, the significance of immigration decisions, cultural differences, difficulties with language and reliance by migrants on their families and communities for sources of information, shape migrants’ relationships with their representatives, sometimes hindering the effort to gain their clients’ trust. Immigrant representatives’ awareness of their competition was signalled by the concern they expressed when information from the IRs and ICC conflicted because this could cause clients to question the IRs’ competence. The pressure exerted by some clients to achieve their immigration objectives and the responsibility IRs may subsequently feel to meet them, appear to affect their interactions with the CSOs.

Like CSOs who liaise between callers and other INZ officers, IRs usually act as intermediaries between their clients and INZ. While some services provided by IRs are relatively

straightforward, in the main the IRs' intermediary function is very demanding, particularly because they often have long-term interactions with their clients. The latter increased the pressure when IRs faced emotionally challenging situations during the application process and if their clients' immigration aims were not realized. The IRs did not seem to consider that the CSOs had to deal with similarly upset customers. The overall impression was that the IRs thought and knew less about the CSOs' status as immigration officers, the demanding nature of their roles, the training invested in them and the emotion work and other challenges they face daily, than the CSOs knew about the IRs' roles. That nine of the IRs were sole practitioners or were working alone in some way may partly explain their lack of knowledge about the CSOs. Unlike the significant ongoing training and knowledge testing of CSOs, most of the IRs did not have that support provided for them. IRs who are sole operators have to arrange their own professional development and for licensed advisers 20 hours per year is mandatory and must be linked to competency standards that do not include information about INZ employees and their roles. The latter, together with a necessary focus on running their business and providing services, does not provide impetus for IRs to have gain a better appreciation of the CSOs they and many of their clients have regular contact with. Overall the isolation of the IRs was marked when compared with the information, technical and social support CSOs receive to perform their roles.

## Chapter 6: Discussion

### 6. Introduction.

This chapter discusses the findings of the research. It begins by summarising the findings and linking them to the original aims of the research. The chapter then discusses the theoretical and practical implications of the findings. Five key issues are explored. The first is professional or expert call centres versus traditional low skill call centres. The second is the relationship between call centre staff in government departments and expert callers. The third is work organisation: the quantity versus quality dilemma and the fourth is about emotional labour in complex public sector call centres. The fifth discusses the challenges of gatekeeping and enabling. After this the limitations of the study are described and the directions for further research are recommended. Lastly, there is a concluding statement.

### 6.1 Summary of findings.

The research aimed to investigate the complementary expectations and experiences of callers who request and receive information from the Immigration Contact Centre and the customer service officers supplying advice. The intention was to examine whether there are incompatible expectations and associated challenges experienced by immigrant representatives and customer service officers and whether this affects their experiences as users and employees of Immigration New Zealand's Contact Centre.

I was particularly interested in the experiences of immigrant representatives. The experiences of expert callers contacting 'professional/public sector' call centres for information is an under researched area. To date, there is little academic research, in New Zealand or elsewhere, into either the expectations that immigrant representatives have of immigration call centres or the expectations, which the people they represent have of immigrant representatives. There is also relatively little research examining CSOs' experiences of interacting with expert callers. This research explored CSOs' experiences of responding to the approaches and requests made by

immigrant representatives. By so doing the study has shed light on a growing, but under researched, dynamic within call centre work. It also goes some way to answering researchers' calls to hear more of the customers' voices in call centre research (Bolton & Houlihan, 2005; Paulet, 2004).

There are many similarities in the challenges of working as a customer service officer (CSO) and immigrant representative (IR). They both perform multiple roles, namely as enablers of migrants, interpreters of law and policy, gatekeepers, intermediaries, and advocates. Both groups are often the first point of contact for prospective migrants to New Zealand and impressions formed by these interactions can influence migration decisions. Both groups need to navigate, interpret, apply and keep abreast of complex, rapidly changing technical information. Both groups faced the problem of inconsistent information and considered this was symptomatic of inconsistency in the wider organisation of Immigration New Zealand (INZ) and within government immigration policy.

Both CSOs and IRs liaise between their clients and INZ case officers facilitating the immigration process. Both groups want the best outcome for their clients, but they also have to evaluate whether clients are likely to satisfy legal requirements and policy criteria. Neither is always able to help and both sometimes provide unwelcome information. Like CSOs, immigrant representatives do emotion work when relating with clients and both have to manage their feelings when communicating policies and decisions that appear incorrect or seem unfair. Both groups interact with global clients and encounter language and cultural impediments to effective communication. Both groups described their mutual customers as vulnerable, anxious, and sometimes very demanding, because of the high value migrants place on obtaining New Zealand visas and applicants' financial and emotional investment in visa applications.

The IRs and CSOs expressed contrasting experiences and perspectives. Given the slight antagonism a minority of IRs voiced towards the ICC, it was interesting that some CSOs spoke of peer-like relationships with licensed advisers and lawyers. CSOs noted that with their knowledge of the immigration system, immigrant representatives were often more realistic in their expectations of the CSOs than other callers. Immigrant representatives were vocal about what immigration

expertise CSOs should have. It appeared they were unaware that CSOs receive extensive training and face ongoing tests of their technical knowledge. Immigrant representatives remarked on the complexity of and inconsistencies of the immigration system yet were resolute in their expectations of quick, accurate and consistent information provision by the CSOs.

IRs emphasized the need to spend time with clients to fully understand their immigration requirements whereas CSOs asked incisive questions to quickly identify information needs. Lengthy calls created a number of stressors for CSOs because of their productivity objectives. While both groups remarked on the benefits of communicating with experts some immigrant representatives had created their own contacts within INZ who they could approach directly. These contacts were developed prior to the establishment of the ICC's business-to-business team dedicated to calls from immigrant representatives.

In summary the CSOs and IRs share three major dilemmas: -

navigating complex policy;

inconsistency in the immigration system;

applying rules while remaining customer-oriented and empathetic. The attempts of IRs to deal with the underlying organisational issues of complex policy and inconsistency appeared to exacerbate the problems for the CSOs. IRs claimed that inaccurate and inconsistent information contributed to repeat calls to the ICC. Such is the concern about their immigration situation some clients check the information they receive. Generally CSOs found repeat calls a nuisance, noting that many persistent callers were those who refused to accept the information they were given because it did not suit them. The IRs noted complex information, cultural barriers, English language difficulties, and hearsay could cause their clients to make repeat calls to check information as could a discrepancy between the experience of lodging a visa application compared with the information the CSO gave about the process. While CSOs and IRs felt responsible for ensuring their customers receive accurate information neither welcomed the questioning of the information they provided.

A comparison of the data from both the IRs and CSOs identified similarities and contrasts in their complementary experiences. It identified their mutual responsibilities, strengths and shared challenges. The following sections discuss some key issues arising from the IRs' and CSOs' accounts of working in and interacting with an expert call centre and from the migration of the call centre model to the public sector.

## **6.2 Professional or 'expert' call centres versus traditional low skill call centres.**

The literature indicates that before call centres provided professional or expert services, the work was largely considered low skilled (Russell, 2009; Taylor & Bain, 2001, 2005; van den Broek, 2003). The research indicates the skill level required in call centre positions is dependent on a wide range of factors hence the earlier argument it is important to adopt a multi-faceted approach to assessing skill requirements. One approach to evaluating skill level is to consider the consequences of the information given. In INZ's Immigration Contact Centre CSOs are accountable for providing information that has a significant impact on the lives of migrants and their New Zealand contacts and potentially on the prosperity of the country. Other criteria to consider when assessing call centre skills include the knowledge required (e.g., theoretical, higher- and/or lower-order contextual knowledge) and how this is employed. This study demonstrated the CSOs' work was located at the higher end of the skill continuum given the weight of the information and interpretive work they perform. In regard to the latter van den Broek (2003) made the important point that judgement that can only be codified to a degree. The degree of lower- and higher-order contextual knowledge the CSOs need to do their work frequently outweighs that of case officers processing visa applications because the latter often specialise in only one aspect of policy at a time (Controller and Auditor-General, 2009). Furthermore, the CSOs access and apply knowledge on the spot.

CSOs expressed concern that some callers did not appreciate the extent of their skills and that call centre work carries a stigma and is associated with low level skills so that officers outside the ICC would not want to transfer there. If other INZ staff and expert callers to the ICC



appreciated the skill demands of the CSOs' job and if the position attracted the same remuneration as those of other warranted immigration officers, this might counter the impression that the CSO role is of lower standing. This might also lead to higher retention rates in the ICC and encourage a voluntary two-way movement of officers between the ICC and the other branches, rather than a consistent flow of knowledgeable employees out of the ICC. This could make savings in recruitment and training costs and also facilitate communication between the different parts of INZ. More generally, the findings of this study suggest that managers of other expert call centres need to ensure their employees' skills are properly recognised, acknowledged and rewarded.

Like the employees in the URCOT (2000) study, some CSOs indicated they felt separate from the rest of INZ despite the management initiatives to link the ICC to the wider organisation (see page 101). Ensuring officers in the wider organisation understand the demands on call centre employees may increase co-operation between the two functions which may in turn lead to more accurate information, better customer service and cost-efficiency.

### **6.3 The relationship between call centre staff in government departments and 'expert' callers.**

The findings of this study suggest that the call centre model of work organisation frequently creates difficulties for both staff and expert users. Albeit the CSOs in the business-to-business team dedicated to immigrant representatives have more call handling time than the other Voice teams, the relatively brief interactions are not conducive to dealing with expert callers with complex enquiries. Often answers to questions will not be immediately available. Research and consultation with colleagues may be required hence an IR's compliments about CSOs who offered to obtain the information sought and call back. Conversely for at least one of the IRs, who dealt in complex cases, the call centre model's association with speedy replies created unrealistic expectations of quick answers to difficult questions. Copas's (2004) notion that callers require staff to take as much time to deal with their queries as is necessary whereas the CSOs are embedded in the call centre setting where calls must be answered quickly applies to IRs as much as it does to the public. It

would seem appropriate for management to support staff to decide when to research and to call back.

It takes time for staff to locate, read, interpret and apply complex law and policy to individual circumstances. Policy is not always clearly written. In addition to advice on a section of policy generally, an expert caller may ask how a particular branch interprets that policy and seek examples and illustrations. Due to variations in how INZ offices apply policy the CSO is unlikely to have an answer unless that matter has recently been raised. Call centre staff are reliant on the resources they are supplied with. If these are lacking, vague or unclear and if there is a great deal of discretion in how policy is applied, then it becomes very difficult for staff to provide definitive advice.

Some immigrant representatives noted they are often consulted when potential migrants anticipate or experience difficulties. For this reason client representatives may be useful as a particular source of intelligence about the performance of the organisation with which they interact. Examining their experiences provides information about the characteristics of clients who seek their help, may indicate problems with how laws, policies and procedures are operating and with how the wider organisation is communicating. Some public sector organisations exploit this source of information. Officials from the Work and Income contact centres and beneficiary advocate groups meet regularly to hear matters of concern (Controller and Auditor-General, 2006).

Both groups have lessons to learn from hearing about their complementary experiences, which may increase the well-being of both parties and benefit their mutual clients. Acknowledging the extent of the expertise customer service officers and immigrant representatives must have to do their jobs effectively may increase mutual respect, making interactions more productive and pleasant and the latter, the majority of whom work as sole operators, may not feel so isolated.

The research indicated that comparing the experiences of call centre employees and expert callers identifies underlying organisational problems, which affect both groups. The efforts made by the ICC to address inconsistencies in the immigration system may encourage IRs to report these and

other problems as systemic issues and not regard them as errors by the contact centre or individual staff. Understanding what motivates repeat callers may help customer service officers to better tolerate persistent callers. Facilitating regular communication between expert callers and contact centre employees may promote a better understanding of the challenges these groups face and how they meet them. In turn, this may increase the skill and knowledge resources each group has to perform their work more effectively.

The study findings indicate that public service organisations would do well to provide specialised information services to expert clients, whether by offering business-to-business services via a contact centre or by some other means. For example, the Inland Revenue Department assigns an account manager to provide support services to every listed tax agent (Inland Revenue Department (IRD), 2014). IRD also advises tax agents how to work with IRD. INZ too is in the process of developing more managed relationships with immigrant representatives. The research indicates that expert clients have specialised information needs and high service expectations and if these are not met formally by the organisation they are likely to locate employees through informal networking to meet their needs. This means the communication channel between the organisation and client representatives is neither managed nor centralised thereby risking service inconsistency.

Expert callers search for expert employees. Organisations may need to offer incentives to retain expert staff, particularly those working in contact centres, given the short tenure that characterizes these workplaces and career paths that usually aim for the call centre employee to join the wider organisation.

#### **6.4 Work organisation: the quantity versus quality dilemma.**

The literature on call centres traditionally focuses on the tension employees experience trying to satisfy the competing drives of cost-efficiency versus quality (e.g., Korczynski, 2002; Russell, 2002; Taylor & Bain, 1999, 2005). In these discussions quality is usually equated with customer service (e.g., Gilmore, 2001). In some public service call centres the balancing act

between efficiency targets and quality have serious consequences. The quality of the interactions between ICC employees and callers has the potential to affect decisions to migrate and this has ramifications for meeting New Zealand's skill, labour and business needs as well as personal consequences for potential migrants. Cost-efficiency remains important because the public service is accountable for the cost-effective use of taxpayer funds. With the migration of the call centre model to the delivery of government services comes a third imperative for employees to satisfy, namely information accuracy. In this respect the current study supports Anderson et al.'s (2006) observation that a crucial component of the drive for quality in public sector call centres may be reinterpreted as the requirement for accuracy.

Ellway's (2014) case study of a UK call centre operating in the telecommunications industry examined quality and quantity in terms of the entire customer enquiry including the total time required by all employees involved in the enquiry rather than at the level of the individual agent or call fragment. As Ellway (2014) suggested, adopting this broader unit of analysis means that quality-quantity need not operate as a trade-off, but can be mutually reinforcing. For example, while recording adequate call notes takes time, the effort will likely save time for the next call handler when the customer makes further calls. Ellway (2014) also recommended a focus on successful closure of calls on first contact to reduce repeat calls. The ICC has adopted a similar long-term commitment to quality that has already produced benefits with the strategy, "quality one (or first) call resolution".

Observations, interviews and diaries indicated that CSOs experienced mixed signals about whether time constraints and processing volume took precedence over call quality on the call centre floor. Certainly the CSOs' performance objectives of quality and quantity are intertwined making them difficult to differentiate. While the call centre as a whole may reasonably be expected to meet objectives that interweave quality and quantity in the long term, applying these objectives to individual CSOs or individual calls may impose unrealistic expectations. Ellway (2014) recommended *permanently* lowering quantitative targets at the individual agent level in the interests

of long-term gains. He noted that there is a tendency for management to allow throughput objectives to gradually regain dominance. This pattern was evident in the ICC; while there had been emphatic emphasis on quality in the ICC by removing the focus on call statistics, this was temporary and call statistics were re-introduced after a relatively brief hiatus. Given the pressures of marketization and managerialisation the latter seems unavoidable. Anderson et al. (2006) identified a government call centre where accuracy clearly had priority, but observed that managerial staff still felt under pressure to match industry standards in terms of voice readiness (associated with quantity), conscious of the possibility of having to compete in the market for the delivery of their services.

Employee burnout continues to be a problem for call centre managers (Rod & Ashill, 2013). Deery et al. (2002) found that agents, who on average spent more time per call, were significantly less likely to experience emotional exhaustion indicating that relaxing quantitative targets will lessen burnout. Russell's (2009) research indicated it was employees in public sector call centres who most strongly identified with their employing organisation because employees felt they were making a difference to people's lives. Certainly the ICC employees expressed a real sense of satisfaction from helping their callers. This means public sector employees are likely to feel frustrated if productivity objectives allow them to offer only the appearance of service. Public sector call centres providing complex services could consider implementing Ellway's (2014) recommendation to lower volume targets. At the very least the literature indicates clarity about expected performance would likely reduce the risk of the employees experiencing their work as stressful (Sprigg, Smith, & Jackson, 2003).

The competing drives ICC customer service officers encounter create fundamental paradoxes in the job design and the literature suggests these tensions have ramifications for both the well-being of employees and the quality of their advice to customers. The criteria used to evaluate the CSOs' performance at the ICC shows that management attempts to exert a high degree of control over most aspects of the work. This level of surveillance is an almost inevitable

consequence of providing public services through the call centre model, where the need to ensure accuracy and specify standards of behaviour becomes urgent. An examination of the extensive criteria used to evaluate the quality of the CSOs' interaction with customers and their productivity targets with a view to simplifying and lowering these might be timely. Even if these demands are modified as CSOs develop their competence this would indicate trust in their capability and commitment to producing the outcomes the organisation requires. Managers in other public sector call centres performing this type of work could consider a similar approach. Certainly it would seem useful to openly acknowledge and discuss with customer service officers the various tensions in their work and work with them to design socio-technical systems, which enable them to cope with the pressures of their work.

Neo-liberal economies have attempted to recast the management of government departments and state-owned enterprises along the lines of business enterprises so that performance is compared with that of 'equivalent organisations' in the private sector (Anderson et al., 2006; Phang, 2006). Along with this move there has been an attempt to create a business customer centred culture in public sector organisations (Humphries & Camilleri, 2002). This study indicates there are obvious difficulties imposing a marketing and customer service culture on a public sector organisation that has a regulatory and compliance function. It may be useful in the interests of public sector call centre employees and potential migrants to set out what callers can expect from call centre staff clearly differentiating what they offer in terms of information and advice from the services available from client representatives.

## **6.5 Emotional labour.**

Emotional labour has altered and become even more challenging to perform as neo-liberal economies use private sector solutions for the provision of public services. Firstly, interactions in government call centres can be with people who are angry and upset about very serious personal matters. In many instances public servants can neither solve callers' problems nor

provide information callers seek due to the remits of their organisations. Secondly, the discipline of the market place requires positive, empathetic customer centric service driven by quantifiable targets. Employees are required to treat caller recipients of public services as if they are “market-powerful” (Brereton & Temple, 1999, p. 472) and must try to maintain the myth of customer sovereignty. Thirdly, the State Services Commissioner’s Code of Conduct (2007) and traditional public service values create expectations in employees and callers that as public servants the former will show a sincere willingness to help callers. Fourthly, in most government call centres the primary focus is likely to be on conveying complex technical information with accuracy.

Burgess et al. (2005) mentioned the high stress of many areas of public service provision by call centres. Anderson et al. (2006) suggested that better working conditions and pay found in public sector fortified the frontline staff to cope better with their performance of emotional labour compared to their private sector counterparts. There is some consensus in the research on emotion work in both private and public sector call centres that supports Hochschild’s (1983) view that the psychological costs of emotional labour would be reduced if workers had more control over the conditions of their work. More manageable workloads allow employees to cope better with emotion work (Russell, 2009). The current study showed that the CSOs had a degree of control over their interactions and were permitted to interrupt callers and they could terminate abusive calls. Furthermore one of the longer-serving employees had decided to take her time over emotionally laden calls and considered her service was compassionate and effective as a result. This indicated management trusted their staff to exercise some control over the timing of interactions.

The study findings indicated some customer service officers employed emotional distancing somewhat akin to the second approach Hochschild (1983) observed service workers adopted towards emotional labour. This appeared to be a functional mechanism along the lines of ‘detached concern’, blending professional care with appropriate emotional distance (Bakker, Schaufeli, Sixma, Bosveld, & van Dierendonck, 2000). Emotional distancing as a tactic to manage angry callers was supported by managers in Healy and Bramble’s (2003) study of emotion work in a

public sector call centre and usefully employed by employees in Russell's (2009) study. Both these approaches and other strategies successfully adopted by customer service officers could be explored as constructive ways of coping with emotion work and introduced to new call centre workers during training in complex call centres.

IRs who worked as sole operators, were their own emotion managers. Like the CSOs they interacted with people who did not like receiving information that went contrary to their aims. In so doing they had to deal with their clients' questions, requests for reassurance and emotional responses. They also had to cope with their own frustration when their clients checked on their advice with other sources. In contrast with the CSOs' one off encounters with callers, IRs have longer interaction with their clients making it a challenge to deal with their own emotions when visa applications are declined.

## **6.6 Gatekeeping and enabling.**

The study showed the ongoing tensions underlying the immigration system, including the difficulties faced by the CSOs and IRs as both gatekeepers and enablers. These two functions are often directly in conflict. CSOs and IRs are in a similar position sandwiched between migrants' aspirations and immigration law, policy and procedures. In their dual roles they both promote New Zealand and help facilitate the immigration process for migrants New Zealand wants and dissuade migrants New Zealand does not want. Both IRs and CSOs attempt to manage their clients' situations through a complex system that is fraught with inconsistencies so that what is regarded as normal procedure by one branch, may be unacceptable by another branch, making it difficult to provide definitive advice.

As gatekeepers and enablers CSOs and IRs attempt to gather, sift, translate, and convey information from their customers so it makes sense to INZ staff and vice versa. The content and the way information is presented can potentially affect the outcome of visa applications. For example, CSOs and IRs can advise clients on what sort of information will increase the chances of a visa



application being favourably considered as an exception to normal policy. While these groups have influence neither has decision-making authority and if they want special action taken in their clients' favour they usually need the co-operation of other INZ staff. The research showed for example that a CSO might decide to ask a case officer to process an application faster than usual. Similarly, immigrant representatives may ask a case officer for more time to present information to support a client's visa application. In many situations CSOs and IRs choose whether to advocate for their clients to INZ or to strictly apply rules and procedures. Both parties weigh the costs and benefits to their clients and to themselves. CSOs make these decisions at speed during calls. Immigrant representatives have more time to decide which situations warrant advocacy. Once they decide to advocate for a client both groups draw on their communication skills, powers of persuasion and technical knowledge. There are several differences in their dual roles however.

CSOs span the boundary between their INZ colleagues and callers whereas immigrant representatives occupy the space between INZ and the migrants. The CSOs' alliance with INZ is much stronger because they are INZ employees and as such are expected to act impartially. This means the CSO must carefully consider the circumstances presented by the caller before approaching other immigration officers to prioritise an application because sound justification is needed. Immigrant representatives should and are likely to favour their clients making their role as advocates and enablers more straightforward. CSOs are required to perform a compliance function, communicating immigration rules such as advising callers to leave New Zealand if their visas have expired, whereas immigrant representatives do not have the same pressure although they do have to counsel their clients to comply with immigration law. To a greater extent immigrant representatives select what and how information about their clients is passed on with their clients' interests foremost in mind. These differences may influence what emphasis CSOs and IRs apply in their dual roles as enablers and gatekeepers. IRs may be more likely to enable while CSOs more likely to gate keep. Many clients do not seem to expect either group to apply regulations impartially and there is a

great deal of emotional energy expended when CSOs and IRs perform this function and receive an unfavourable response from clients.

With their dual roles as gatekeepers and enablers CSOs, and probably IRs, can experience role conflict - the extent to which the employer communicates incompatible expectations to the employee. This may lead to emotional exhaustion for some (Jackson, Schwab, & Schuler, 1986; Knights & McCabe, 1998; Leiter & Maslach, 1988; Schwab & Iwanicki, 1982; van den Broek, 2003). The psychological risks that accompany dual role positions where role conflict is sometimes experienced need to be recognised so that support can be made available. For example, the Licensed Immigration Advisers Code of Conduct 2014 could mention the need for self-care in the case of sole traders and for employers to discharge their duty of care to employees in accordance with the Health and Safety in Employment Act 1992, which requires psychological hazards to be managed.

Other public sector call centre employees and associated private sector experts, such as the Inland Revenue Department and tax agents and MBIE's Employment Relations and employment advocates, who perform the sometimes conflicting roles of enabling and gatekeeping, may learn from the challenging experiences of the CSOs and IRs.

## **6.7 Limitations.**

This research is a small-scale exploratory, qualitative study. Given the small amount of literature on expert call centres and on the experiences of expert call centre customers this research approach seemed apt because in qualitative inquiry the researcher explores situations about which little may be known (Royse, 2004). A small sample was used to allow in-depth analysis, however the drawback of this approach is that the findings may not be generalisable.

A selection of the findings from the immigrant representatives' data was presented to the customer service officers for their responses. With hindsight I believe presenting the customer service officers' accounts to immigrant representatives would have been of value because it is likely further common experiences and problems would have been identified.

The research was carried out for a Master's thesis and therefore it had to be conducted by a single person. This may have slightly weakened the strength of the analysis because inter-rater assessment of the transcripts was not possible. It would have been useful if one or more co-researchers were able to arrive at agreement on the themes identified in the final report.

Finally, this study has taken place over nearly four years due to competing priorities generated by the business I am a partner of. There is a risk that some of the processes customer service officers must follow and their performance demands have changed.

## **6.8 Reflections.**

Several of my assumptions about call centres were challenged when studying the experience of the ICC's customer service officers. The performance objectives and the knowledge they required about the immigration system was staggering. I recognised I had unrealistic expectations of the CSOs' expertise.

As an immigrant representative I was fascinated to note the use of personal contacts within Immigration New Zealand was common amongst that sample. I also recognised that I worked in isolation from other immigrant representatives and that I therefore relied heavily on my personal network of INZ contacts for information. I believe that IRs can learn from one another's expertise and experiences and therefore support the changes to the continuing professional development requirements for renewing the immigration adviser licence that require connecting with other licensed advisers (Immigration Advisers Authority, 2014b).

While there are sometimes problems with inaccurate and inconsistent information from the ICC, the primary cause appears to be the complexity of procedures and legislation surrounding immigration. Appreciating the efforts made and the concern the customer service officers expressed for their clients gave me the confidence to make more use of the ICC generally rather than relying primarily on my personal contacts.

### **6.9 Directions for further research.**

One purpose for this research, of possible interest to INZ, was for it to serve as a pilot for a survey of the reasons people call the ICC. Comparing the experiences of the parties to the ICC interactions pointed to two major problem areas, namely difficulties in communicating complex policy and inconsistency in the immigration system. Future research could develop a survey to more clearly specify where these issues are most problematic.

The ICC's business-to-business team providing services to licensed advisers, lawyers and other groups exempt from licensing, has operated for over three years. This has presumably allowed some CSOs in this team to build expertise in response to meeting immigrant representatives' particular information needs. It would be interesting to investigate the effects of expert-to-expert contact on the accuracy of information supplied from the immigrant representatives' perspective and whether their use of the ICC for policy and procedural information has increased. Additionally, some immigrant representatives and customer service officers may have had the opportunity to develop relationships that go beyond one-off interactions. It would be useful to gauge whether the slight antagonism sometimes found between customer service officers and immigrant representatives is still present between these two groups.

### **6.10 Conclusion.**

This thesis presents and discusses the findings of research conducted with callers to and staff of Immigration New Zealand's Contact Centre. The experiences of immigrant representatives and customer service officers are similar in many respects. There was laughter and unanimous agreement when CSOs were presented with an immigrant representative's description of the intricacies of the instructions. CSOs and IRs also identified problems caused by inconsistencies in the immigration system. Both showed concern for their mutual clients and both experience difficulty performing emotional labour while applying rules and regulations.

It appears that when public sector call centres deliver complex services the job skill requirements surpass those required in commercial call centres. This is attributable to the regulatory function of many government services and the prioritising of the accuracy of information. These drivers add to the persistent challenge facing call centres of balancing cost-efficiency and customer service. The latter requirement is intensified by the traditional notion of the public service's duty to help people. The foregoing makes the job of the public sector call centre employees very demanding particularly when it involves dealing with expert callers. The latter have high service requirements shaped by expectations created by commercial call centre culture. It is in the public service's interest to support competent employees who are willing to provide long service in their expert call centres.

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## Appendices

### Appendix A: Possible Interview Questions for Immigrant Representatives

- 1) Why did you decide to become an immigration consultant? Or In what capacity do you make calls to the Immigration Contact Centre?
- 2) What are the main reasons you make calls to the Immigration Contact Centre (ICC)? (for example, for information about immigration law, policy or procedures; to speak with a case manager; problems with a Branch's action/inaction; questions or complaints about decisions to decline visas; other – please describe).
- 3) About which policy category do the majority of your calls concern? (for example, Residence, Temporary Entry Class Visa, Transit Visa, Border Entry, Compliance, Refugees and Protection).
- 4) Within that category is there a sub-category that you mainly call about? (for example,
  - a) Residence  
 Residence Visa - Business - Family (please describe) - Skilled Migrant - Residence from Work - Special Category (Please describe)  
  
 After the Grant of a Residence Visa - Variations of Travel Conditions - Permanent Residence Visa
  - b) Temporary Entry Class Visa  
 Visitor Visa –Partners of Students or Work Visa Holders - Partners of NZers – Business Visitor – Other Special Categories (Please describe)  
  
 Work Visa – Study to Work – Family Stream – Seasonal Work- International/Humanitarian – Essential Skills – Silver Fern - Work to Residence – Specific Purpose – Other (Please describe)  
  
 Interim Visa  
  
 Student Visa  
  
 Limited Visa  
  
 Military Visa  
  
 Special Temporary Visas
  - c) Transit Visa
  - d) Border Entry

- e) Compliance
  - f) Refugees and Protection
  - g) Other (please describe).
- 5) What are the experiences your clients have of the ICC? Can you give me some examples?
  - 6) What expectations do you think your clients have of the ICC?
  - 7) What expectations do you have of the ICC?
  - 8) How do you feel when you have to telephone the ICC? (for example, convinced you will get a good answer, nervous, resigned, irritated?).
  - 9) What is it like asking for information/advice/assistance? (for example, is it easy to convey your question/problem?).
  - 10) Did you receive the information/advice/assistance you wanted? Were you satisfied with the response in regard to the completeness of the answer?
  - 11) How useful was the information you received? What did you and/or your client do with it? Do you know what happened as a result?
  - 12) Could you give me an example of a call that seemed really well answered?
  - 13) Would you give me an example of a call you made that was really frustrating for you? What was it about the call that made it frustrating?
  - 14) What aspects of the Contact Centre do you think work well? What are the things you think don't work?
  - 15) How do you feel about having to speak with a different Customer Service Officer (CSO) each time you call the ICC?
  - 16) How do you feel reporting back to your clients after contacting the ICC? (for example, do you feel generally positively or negatively about it?).
  - 17) What do you think CSOs do really well? What do you think they do badly?
  - 18) Are there things that could be changed to make the Contact Centre work better (for immigrant representatives; for other callers)?
  - 19) As a representative of individuals or groups with immigration problems, what key issues do these people have? Are there recurring issues?

## Appendix B: Outline of Interview Topics for Customer Service Officers

### Outline of Interview Topics for Customer Service Officers

I have some appreciation of the very demanding nature of call centre work. I believe that your role as a Customer Service Officer with INZ is particularly complex, given you are explaining the application of immigration law, policy and procedures to individual situations so the callers (English and non-English speakers from many countries, cultures and social, educational and economic backgrounds) understand. It is also a very important role because the calls you handle are often the first personal contact a potential migrant has with New Zealand bureaucracy. I am interested to learn how you experience your job.

#### 1) Demographic Details

I am interested in the time you have worked at Immigration NZ, the positions you have held and your reasons for choosing to work at INZ.

#### 2) Likes and Dislikes

I am keen to find out what you like and dislike about your job.

#### 3) Job Content

I will ask you about what your job involves, its most important aspects and the actions you usually carry out during a call. I will also ask about what you think are the main reasons people call the ICC.

#### 4) Expectations of others

I am interested in what you think most callers' expectations are of the ICC and how realistic those expectations are. I also want to ask you about handling calls from immigrant representatives.

#### 5) Difficult Aspects of the Job

I will ask you about your experience handling difficult questions and difficult callers, including those who don't speak English fluently. I am also interested in how you deal with callers who have already phoned the ICC several times and still haven't had their question answered (in their view). I will also ask about your experience of getting assistance to answer difficult questions.

#### 6) General Organisation of the Call Centre

I am interested in what aspects of the Contact Centre you think work well and which don't. I will ask you if you have suggestions to make the Contact Centre work better (for CSOs; for callers). I am also interested in what you think representatives of immigrants could do to improve the effectiveness of the calls they make to the ICC.

I appreciate you giving your time to this research.

## Appendix C: Possible Interview Questions for Customer Service Officers

### Customer Service Officers Interviews

#### 1) Demographic Details

Time worked at INZ.

Positions held.

Reasons for choosing to work at INZ.

#### 2) Likes and Dislikes

What do you like about your job?

What do you dislike about your job?

Do you find it tiring answering the phone all day?

Is it difficult to get enough exercise in a sedentary job like this?

Do you get enough downtime between calls etc.?

#### 3) Job Content

Can you tell me what your job involves?

What do you see as the most important aspects of your job?

(for example, providing information about immigration policy; promoting New Zealand as a preferred migration destination; solving callers' problems; advising callers about what they need to do to achieve their aims)?

What do you see yourself providing to callers?

What guidelines do you work within?

What are the actions you usually go through when you answer a call? (for example, ask the caller clarifying questions, access INZ Instructions for information on policy and procedure, access the Application Management System (AMS) to locate client record, add information to AMS, provide information to caller, log call, etc.)?

What are the main reasons you find people call the ICC (for example, how to fill in forms; enquiries about immigration policy, law, procedures; application status enquiries; problems with a Branch's action/inaction; questions/complaints about decisions to decline visas; general enquiries about living or working or studying in New Zealand; other – please describe)?

How long on average do you talk with a client? At what point do you decide a call is complete?

**A migrant representative said it takes quite a long time with a client to fully understand their situation.**

#### 4) Expectations of Others

What expectations do you think most callers have of the ICC?

How realistic do you think these callers' expectations are?

What expectations do you think most representatives of immigrants (e.g., solicitors, licensed immigration advisers, MPs' offices, Citizens Advice Bureaux, Community Law Centres) have of the ICC?

How realistic do you think these callers' expectations are?

How do you feel when you have to deal with a call from an immigrant representative in comparison with a non-immigrant representative?

## 5) Difficult Aspects of the Job

Can you give me an example of a really difficult caller you have handled?

How do you ensure you communicate your message when you are speaking with someone who does not seem fluent in the English language?

What is it like when you use the Language Line with a caller?

What is it like during a call when you need to check the Immigration Instructions?

**A migrant representative said, "Well they are pretty good and you get kind of a mixture of problems so you get somebody who can't help and won't go anywhere and someone that can't help and will go to their supervisors." What is it like for you when you consult a technical advisor or supervisor for assistance during a call (for example, do you have to wait)? Can you give an example?**

What is it like dealing with a caller who has phoned the ICC a number of times and still hasn't got their question/concern addressed and is feeling very frustrated?

What difficult questions have you had to answer? What made them difficult?

**Some of the Branch pages on the INZ website state "For advice and assistance on immigration matters...telephone the Immigration Contact Centre". When you are on a call with someone who is deciding whether to lodge an application and is seeking advice and assistance, what responsibility do you have in their decision-making? Where does your responsibility stop and theirs start? Do you give information and advice? Where does giving information stop and providing advice start?**

**A migrant representative said, "Even people who are experienced in Immigration can be caught out by the subtleties of Immigration Instructions. If you don't read them really carefully you can be misled into thinking that something is permitted when it is not, or is not permitted where it is, because there are so many ifs, buts, ands, ors in the Instructions". How would you respond to that?**

**A migrant representative said, "Immigration isn't straightforward at all. You know I have been working with it for quite a long time and I don't find it straightforward at all." What is it like communicating complex information? Can you give an example?**

**A migrant representative said, "in terms of giving information and advice on immigration it is such a complex area and the information and advice that someone gives can have a direct and long lasting impact on someone's life. I mean these are life-changing decisions we are talking about here with regard to whether or not someone can get residency, whether they spend some of their quite often carefully saved funds on a residency application which is doomed to fail because they have been given the wrong information or advice. It can't be overstated I think about the impact bad advice can have."**

How do you feel about providing information given the potentially significant impact your information might have on someone's life?

## **6) General Organisation of the Call Centre**

What aspects of the Contact Centre do you think work well?

What aspects don't work well?

What do you think could be changed within the Contact Centre and/or wider Immigration Group, to make the Contact Centre work better (for CSOs; for callers)?

**For example, a migrant representative suggested that CSOs should have some experience in a branch before they work in the ICC. Another suggested the ICC should provide information only and not advice. Yet another suggested the ICC provide updates on application status and neither information nor advice. Another suggested the ICC should be available in the weekend.**

What do you think representatives of immigrants could do to improve the effectiveness of the calls they make to the ICC?



## Appendix D: Five-day Diary for CSOs

### Five-day Diary for

INZ Immigration Contact Centre - Customer Service Officers

Please answer these questions each day, for five working days starting Monday 5 December 2011

You will need about 20 minutes before the end of your shift each day to do this  
Please use additional sheets of paper if necessary in order to answer the questions fully

For more information on the study please see the associated Information Form  
Any questions please ask Alyson or email Alyson at [vanpetegemscott@xtra.co.nz](mailto:vanpetegemscott@xtra.co.nz)

Name .....Date you started work as a CSO ../../.. Today's Date ../12/11

#### Question One

**Please describe the most satisfying call you experienced today.**

**a) What was the call about?** (For example, enquiry about policy or procedure or the law; application status enquiry; complaint about a Branch's action/inaction; complaint about a Branch's decision; other – please describe).

**b) Why was the call satisfying?** (For example, you gave information the caller wanted; you gave the caller sound advice; you solved a problem for the caller; you were calm during a difficult call; you increased your knowledge; other – please describe)

**c) How did you deal with it?** (How did you actually deal with the call? Did you celebrate the satisfaction you experienced? How?)

**d) The type of caller it was or who you consider it was?** (Please circle one)

Applicant	Potential applicant	NZ family member or friend	Employer
Licensed Adviser	Solicitor	Community Law Centre	MP's Office
Citizens Advice Bureau	Government Department	Other (please describe)	

**e) What area of Immigration policy was the call about or associated with?** (Please circle one or more)

Work Visa – *Study to Work – Student and Trainee – Family Stream – International/Humanitarian – Hort/Vit Seasonal-Fishing Vessel Crew*  
*Essential Skills – Silver Fern – Religious- Work to Residence – Specific Purpose – Long Term Business Visa – Other* (Please describe)

Visitor Visa – *Partner of NZer – Partner of Student or Work Visa Holder – Business Visitor – Other Special Categories* (Please describe)

Student Visa                      Limited Visa                      Refugees and Protection (please describe)

Residence Visa – *Business (Entrepreneur- Migrant Investment- Entrepreneur Plus-Relocating Employees) – Family (Partnership-Retirement-Parent-Dependent Child-Sibling-Adult Child-Adoption)- Skilled Migrant*

Residence Visa - *Residence from Work*

Residence Visa - *Variations of Travel Conditions – Permanent Residence Visa*

Residence Visa - *Special Category* (please describe)

Compliance (please describe)

Border Entry

Other (please describe)

## Question Two

Please describe the **most difficult call** you experienced today.

**a) What was the call about?** (For example, enquiry about policy or procedure or the law; application status enquiry; complaint about a Branch's action/inaction; complaint about a Branch's decision; other – please describe).

**b) Why was the call difficult?** (For example, difficult question; caller didn't like the information you gave; caller was rude and/or or upset; caller was confused; there were language difficulties; there were communication difficulties; it was difficult to explain complex procedures; the caller kept you on the phone too long; you had to deliver bad news)

**c) How did you deal with it?** (How did you actually deal with the call? How did you deal with any emotional distress you may have experienced as a result of the call?)

**d) The type of caller it was or who you consider it was?** (Please circle one)

Applicant	Potential applicant	NZ family member or friend	Employer
Licensed Adviser	Solicitor	Community Law Centre	MP's Office
Citizens Advice Bureau	Government Department	Other (please describe)	

**e) What area of Immigration policy was the call about or associated with?** (Please circle one or more)

Work Visa – *Study to Work – Student and Trainee - Family Stream - International/Humanitarian – Hort/Vit Seasonal-Fishing Vessel Crew Essential Skills – Silver Fern – Religious- Work to Residence – Specific Purpose – Long Term Business Visa - Other* (Please describe)

Visitor Visa – *Partner of NZer – Partner of Student or Work Visa Holder – Business Visitor – Other Special Categories* (Please describe)

Student Visa                      Limited Visa                      Refugees and Protection (please describe)

Residence Visa – *Business (Entrepreneur- Migrant Investment- Entrepreneur Plus-Relocating Employees) - Family (Partnership-Retirement-Parent-Dependent Child-Sibling-Adult Child-Adoption)- Skilled Migrant*

Residence Visa - *Residence from Work*                      Residence Visa - *Variations of Travel Conditions - Permanent Residence Visa*

Residence Visa - *Special Category* (please describe)                      Compliance (please describe)

Border Entry                      Other (please describe)

**Appendix E: Observation Recording Sheet  
(Silverman, 2010; Whitehead, 2006)**

What can I see :

Describe the interior of the building, visual, sound, smell, feel, heat.

What do people do?

What are they trying to accomplish?

How do they do this?

How do people talk about, characterise and understand what is going on?

What assumptions are they making?

What do I see going on here?

What did I learn from these field notes? Why did I include them?

People interacting.

How I am behaving and how I am being treated:

Items:

Observation Date

Setting

The Time the Observation Begins

The Physical Environment [draw a map]

Visual

Sound

What sort of noise is there?

What level of noise?

Smell

Feel (e.g. temperature)

The Organisation of Objects in the Physical Environment, e.g., spacious, crowded

Event

Answering Calls

Talking to one another

Training

Meeting

Actors

Number

Sex

Age

Dress

Ethnicity

General Observations [leave 3 pages for this] including:

What do people do?

What are they trying to accomplish?

What seem to be the specific goals?

How do they do this?

Individual behaviour – animated, stiff, tense, lackadaisical?

Group behaviour – are there ways the actors are linked, related or differentiated?

Activities – are there groups of behavioural acts that seem to be related?

What language is being used?

Content

Participation (who said what?)

Method – clarity, volume

Location – where is it said?

Time and routinization – when said and whether there is a pattern?

Rationale (what is the purpose of what is being said?)

What gestures or other forms of nonverbal language are used?

How are the actors interacting with one another?

Deferring

Controlling

Instigating

Facilitating

Do behaviours seem to be carried out with any level of emotion or feelings?

What assumptions are they making?

Presence of actor group differentiation in the setting – e.g., by age, sex, position?

Are human needs that seem to be carried out within the setting, act, event, activity?

Other observations

The Time the Observation Ends

## Appendix F: Staff Performance Plan (Department of Labour, 2012)

# Staff Performance Plan

Department of Labour  
TE TARI MAHI



**Employee's name:**

**Employee's title:** Customer Services Officer

**Manager's name:**

**Manager's title:** Immigration Manager

July 2012-June 2013

**Performance year:**

Sign below once objectives and development are planned.

Employee's signature		
Manager's signature		
One-up manager's signature		

### MID YEAR REVIEW

**Sign below at the end of the mid-year assessment**

This is an accurate reflection of our discussions during the mid-year review.

		Date
Employee's signature		
Manager's signature		
Mid-year indicative rating and comment		

**END OF YEAR REVIEW**

**Recommended performance rating**

This is an assessment of the employee’s performance against the objectives (the ‘what’), capabilities, and behaviours (the ‘how’) of the job they are employed to do in terms of the requirements of the whole role, as set out in their position description.

**Select the recommended rating**

- Performance improvement required
- Sound performance
- High standard of performance
- Exceptional performance

**Give the reason for the recommendation**

**Sign below for the end of year assessment**

This is an accurate reflection of our discussions during the review period.

		Date
Employee’s signature		
Manager’s signature		

**Have the employee’s development goals been achieved? Yes / No**

## Section A – What you are expected to do

Add the titles of the key expectations for your role this year. Copy and paste the last table, if needed, for more areas.

### 1 QUALITY

<p><b>SMART objective</b> What do you need to achieve?</p>	<p>Information provided is accurate and complete. Delivers prompt efficient services to meet client needs. And customers are treated with respect and courtesy whilst remaining professional</p>
<p><b>Measurement</b> How can you tell if it's achieved?</p>	<p><b>CSO to provide example/s where you have and/or IM to have observed where you have;</b></p> <ul style="list-style-type: none"> <li>• Provided clear accurate information and quality service</li> <li>• Maintained a customer centric environment</li> <li>• Followed ICC Quality Assurance guidelines to meet the requirements of the customer and of the business (as per observations)</li> <li>• Identified and reported failure demand, seeking clarification where required</li> <li>• Received positive feedback from external and internal customers</li> <li>• Maintained professionalism even in difficult situations</li> <li>• Fully identified the needs and/or expectations of clients</li> <li>• Adhered to the Service Promise</li> <li>• Maintained compliance with processes for ALL ICC templates (OIA/privacy act/fraud, etc) including client confidentiality, ensuring there are no breaches</li> </ul> <p><b>CSO seeks to achieve the average score or higher for the following;</b></p> <p><b>CMS Contacts:</b> (Achieved) 100% or more</p> <p><b>Product Knowledge:</b> (Not met) 74% and under, (Substantially met) 75-79%, (Achieved) 80-89%, (Exceeded) 90-100%</p> <ul style="list-style-type: none"> <li>• <b>Data Integrity:</b> <b>Customer:</b> (Not met) 74% and under, (Substantially met) 75-79% (Achieved) 95-99%, (Exceeded) 100%</li> <li><b>Technical:</b> (Not met) 74% and under, (Substantially met) 75-79% (Achieved) 95-99%, (Exceeded) 100%</li> <li>• <b>Call observations:</b> <b>Customer:</b> (Not met) 79% and under, (Substantially met) 80-89%, (Achieved) 90-96%, (Exceeded) 97-100%</li> <li><b>Technical:</b> (Not met) 79% and under, (Substantially met) 80-89%, (Achieved) 90-96%, (Exceeded) 97-100%</li> <li>• <b>B2B Email QAP:</b> <b>Customer:</b> (Not met) 79% and under, (Substantially met) 80-89%, (Achieved) 90-96%, (Exceeded) 97-100%</li> <li><b>Technical:</b> (Not met) 79% and under, (Substantially met) 80-89%, (Achieved) 90-96%, (Exceeded) 97-100%</li> <li>• <b>B2B Written QAP:</b> <b>Customer:</b> (Not met) 79% and under, (Substantially met) 80-89%, (Achieved) 90-96%, (Exceeded) 97-100%</li> <li><b>Technical:</b> (Not met) 79% and under, (Substantially met) 80-89%, (Achieved) 90-96%, (Exceeded) 97-100%</li> </ul>

**1**    **QUALITY**

<i>Mid-year assessment</i>	Employee's comments
	Manager's comments
<i>Full-year assessment</i>	Employee's comments
	Manager's comments



## 2 PRODUCTIVITY

<p><b>SMART objective</b> What do you need to achieve?</p>	<p>Balancing timeliness and quality in each of our customer interactions while minimising risk.</p>
<p><b>Measurement</b> How can you tell if it's achieved?</p>	<p><b>CSO to provide example/s of where you have and/or IM to have observed where you have;</b></p> <ul style="list-style-type: none"> <li>• Used after call work effectively</li> <li>• Proactively sought to adhere to your roster (including shifts, breaks and scheduled meetings)</li> <li>• Incorporated coaching and training feedback to effect productivity improvements</li> </ul> <p><b>To achieve the average score or higher for the following;</b></p> <p><b>Voice Ready:</b> (Not met) 66% and under, (Substantially met) 67-69%, (Achieved) 70-76%, (Exceeded) 77%+</p> <p>You may wish to keep track of your Voice Ready on a daily basis, but for the purpose of your performance plan, this measurement will be applied and tracked on a monthly basis and any extenuating circumstances impacting on your Voice Ready (such as special duties) will be noted in your monthly catch-ups</p> <p><b>Average Handling time (AHT):</b> AHT is used as an indicator in conjunction with QAP results, although it is expected that your AHT will fall within the following range;</p> <ul style="list-style-type: none"> <li>• Voice: 5:30 to 8:00mins</li> <li>• B2B: 7:00 to 10:00mins</li> </ul> <p>You may wish to keep track of your AHT on a daily basis, but for the purpose of your performance plan, this measurement will be applied and tracked on a monthly basis.</p>
<p><b>Mid-year assessment</b></p>	<p><b>Employee's comments</b></p>
	<p><b>Manager's comments</b></p>
<p><b>Full-year assessment</b></p>	<p><b>Employee's comments</b></p>
	<p><b>Manager's comments</b></p>

### 3 LEADERSHIP

<p><b>SMART objective</b> What do you need to achieve?</p>	<p>Shows awareness of how they lead and contribute to ICC. Responsible for own behaviour, knowledge and development. Establishing effective ongoing relationships with internal and external customers.</p>
<p><b>Measurement</b> How can you tell if it's achieved?</p>	<p><b>CSO to provide example/s of where you have and/or IM to have observed where you have;</b></p> <ul style="list-style-type: none"> <li>• Demonstrated a positive attitude to change and set backs</li> <li>• Put aside emotions so there is no impact on performance and/or working relationships</li> <li>• Taken ownership for building your own knowledge and expertise by using ministry's time, resources effectively and fully engaging in all training initiatives including seeking coaching / training for self development.</li> <li>• Met performance measures whilst demonstrating appropriate behaviours</li> <li>• Received feedback from Manager/Trainer/SCSO and incorporated feedback to effect positive change</li> <li>• Managed your leave balances appropriately</li> <li>• Minimised risk by upholding the code of conduct and ICC 'house rules' including any declarations where potential conflict of interest may exist; taking ownership of S&amp;W</li> <li>• Shared skills, knowledge, information and ideas</li> <li>• Participated and added value to the team and to the ICC culture</li> <li>• Demonstrated behaviours that align with the ICC Culture model, Leadership Charter, Ministry's values and Service Promise</li> <li>• Contributed and supported ICC initiatives, e.g. EEP, System Thinkers and other MBIE initiatives</li> <li>• Represented the ministry's interests with external stakeholders</li> <li>• Celebrated success and diversity including participating in Te Reo and Manaakitanga in support of the Ministry's Maori strategy</li> </ul>
<p><b>Mid-year assessment</b></p>	<p>Employee's comments:</p>
	<p><b>Manager's comments</b></p>
<p><b>Full-year assessment</b></p>	<p><b>Employee's comments</b></p>
	<p><b>Manager's comments</b></p>

## Section B – How you are expected to do it

Use this section to record any [Department-wide capabilities](#) or behaviours that you need to demonstrate in your work. Also use this section to describe the behaviours or capabilities specific to your role. Focus on the capabilities that will make the most impact. Refer to the list below.

<p><b>Behaviours demonstrated</b> What do you need to demonstrate?</p>	<p><b>1. QUALITY</b> Communication Follows instructions and procedures Client focus Building relationships</p> <p><b>2. PRODUCTIVITY</b> Self Management Following instructions and procedures Acting with integrity</p> <p><b>3. LEADERSHIP</b> Self management Collaboration Building relationships Effectiveness for Maori Act with integrity</p>
<p><b>Mid-year assessment</b></p>	<p>Employee's comments</p> <hr/> <p>Manager's comments</p>
<p><b>Full-year assessment</b></p>	<p>Employee's comments</p> <hr/> <p>Manager's comments</p>

## Capabilities

### People cluster Collaboration

#### Acting with Integrity

Leading

#### Building Relationships

Influencing

#### Communication

#### Client Focus

#### Effectiveness for Māori

### Self cluster Self Management

Action Oriented

Drive and Commitment

Adapts to Change

Organisation Awareness

Develops Own Expertise

### Task cluster

Research and Analysis

Judgement and Decision Making

Strategic Thinking

Innovation

Planning and Organising

#### Following Instruction and Procedures

## Section C – Individual development plan

Use this section to note and agree on a development plan to help you perform successfully in your role and/or for your ongoing development. Actions can include technical, professional or capability related development (refer to list above).

<i>Goal</i>	<i>Action to take</i>	<i>Comment</i>	<i>Date completed</i>
<a href="#">Effectiveness for Māori</a> level .....			

## Appendix G: Information Sheet for IR



Te Kunenga ki Pūrehuroa



Massey University  
Private Bag 11 222  
Palmerston North 4442

***“Kia ora and welcome to Immigration New Zealand.”  
A study of immigrant representatives’ experiences of using the Immigration  
New Zealand Contact Centre and Contact Centre officers’ experience of work.***

### INFORMATION SHEET - IR

#### Researcher Introduction

- My name is Alyson Scott and I am a Massey University student. I have been an Immigration Officer in Immigration New Zealand. In my last position I was the Appeals Manager. Since then things have changed. I am now working as a Licensed Immigration Adviser and career practitioner.

#### Project Description and Invitation

- This is a qualitative research project towards a Master of Arts degree in psychology.
- This research is to investigate the complementary expectations and experiences of firstly, immigrant representatives (e.g. licensed immigration advisers, solicitors, staff of Citizens Advice Bureaux and community law offices, MPs) requesting information from the Department of Labour’s Immigration New Zealand Contact Centre and secondly, customer service officers supplying information to immigrant representatives. There is a fundamental tension in the expectations and remit of the Immigration Contact Centre that is likely to cause problems for customer service officers and the people who telephone them. On the one hand customer service officers are expected to identify people New Zealand wants and influence their decisions so they select New Zealand as the first choice of migration. On the other hand these officers also have to recognise people New Zealand does not want and let them know it. They have to ensure potential migrants receive accurate information about policy criteria. The information will not always be what their customers want to hear. What challenges does this present for callers and staff members? How do staff members manage this tension?

#### Participant Identification and Recruitment

- I have recruited immigrant representatives for this study by networking those involved in the immigration industry. I have contacted people from organisations in my local area asking if they

would be prepared to take part in the research as immigrant representatives. People who know I intended to undertake this research have also offered names to me.

- I am inviting people to participate who have made or make calls to the Immigration New Zealand Contact Centre on behalf of immigrants or potential immigrants. I intend to interview licensed immigration advisers, solicitors, an MP, and staff members of community law centres and Citizens Advice Bureaux.

A small sample (10) is to be used to allow in-depth analysis and given the heavy time demands presented by transcription. It is intended that the mix of immigrant representatives will roughly reflect the proportion of licensed advisers and MPs, Citizens Advice Bureaux, lawyers and community law centres used by applicants in the year to May 2010.

### **Project Procedures**

- You are invited to participate in an interview. This will have a semi-structured format and will last around 60 minutes. Where possible questions will be emailed to you prior to the interview so you have time to prepare for them. The interview (with permission) will be recorded, transcribed and analysed as soon as possible. You will be provided with the interview transcript for editing, and with the electronic record of the interview if you request these.

### **Data Management**

- The data will be used within my Master's thesis and may also be published in academic journals. The identity of all participants will be anonymous.
- While all data participants provide are intended to be used for research only, the information will be subject to the Privacy Act 1993 and Official Information Act 1982 and therefore it is not possible to give an absolute guarantee of confidentiality. No callers to the ICC will be named in the write-up.
- While the research is conducted, analysed and reported, the data will be kept in the researcher's lockable brief case and lockable office. No one other than the researcher and supervisor will be given access to the information.
- The thesis would be filed in the Massey University library. A request will be made for the thesis to be embargoed for two years. If it were intended to publish articles from the thesis the Department of Labour's Chief Executive (or representative) would have right of veto. At the end of five years the electronic recordings will be wiped and the written data destroyed except for the thesis unless consent is obtained from participants to store the data for a further time.
- A summary of the research findings will be provided on request by email from the researcher.

### **Your Rights**

*You are under no obligation to accept this invitation. If you decide to participate, you have the right to:*

- *decline to answer any particular question;*
- *withdraw from the study (before the diaries are started);*
- *ask any questions about the study at any time during participation;*
- *provide information on the understanding that your name will not be used unless you give permission to the researcher;*
- *be given access to a summary of the project findings when it is concluded;*
- *ask for the recorder to be turned off at any time during the interview.*

### **Project Contacts**

- Researcher - Alyson Scott, 145 Bay View Road, St Kilda, Dunedin 9012, 03 455 4330, [vanpetegemscott@xtra.co.nz](mailto:vanpetegemscott@xtra.co.nz)

- Supervisor - Dr Jocelyn Handy, School of Psychology, Turitea, Palmerston North, Room P3.16  
06 3569-099, Ext 2055, J.A.Handy@massey.ac.nz
- You are invited to contact the researcher and/or supervisor if you have any questions about the project.
- This project has been evaluated by peer review and judged to be low risk. Consequently, it has not been reviewed by one of the University's Human Ethics Committees. The researcher named above is responsible for the ethical conduct of this research.
- If you have any concerns about the conduct of this research that you wish to raise with someone other than the researcher(s), please contact Professor John O'Neill, Director, Research Ethics, telephone 06 350 5249, email humanethics@massey.ac.nz.

## Appendix H: Information Sheet for CSO



# Massey University

Te Kunenga ki Pūrehuroa



Massey University  
Private Bag 11 222  
Palmerston North 4442

***“Kia ora and welcome to Immigration New Zealand.”***

***A study of immigrant representatives’ experiences of using the Immigration New Zealand Contact Centre and Contact Centre officers’ experience of work.***

### INFORMATION SHEET: CSO

#### Researcher Introduction

- My name is Alyson Scott and I am a Massey University student. I have been an Immigration Officer in Immigration New Zealand. In my last position I was the Appeals Manager. Since then things have changed. I am now working as a Licensed Immigration Adviser and career practitioner.

#### Project Description and Invitation

- This is a qualitative research project towards a Master of Arts degree in psychology.
- This research is to investigate the complementary expectations and experiences of firstly, immigrant representatives (e.g. licensed immigration advisers, solicitors, staff of Citizens Advice Bureaux and community law offices, MPs) requesting information from the Department of Labour’s Immigration New Zealand Contact Centre and secondly, customer service officers supplying information to immigrant representatives. There is a fundamental tension in the expectations and remit of the Immigration Contact Centre that is likely to cause problems for customer service officers and the people who telephone them. On the one hand customer service officers are expected to identify people New Zealand wants and influence their decisions so they select New Zealand as the first choice of migration. On the other hand these officers also have to recognise people New Zealand does not want and let them know it. They have to ensure potential migrants receive accurate information about policy criteria. The information will not always be what their customers want to hear. What challenges does this present for callers and staff members? How do staff members manage this tension?

#### Participant Identification and Recruitment

- I have asked the Immigration Contact Centre management to select 10 customer service officers (two from each of the visitor, work, student and residence visa teams and from the team dedicated to calls from licensed advisers) who I can invite to participate in this research.

A small sample (10) is to be used to allow in-depth analysis and given the heavy time demands presented by transcription.

#### Project Procedures



- You are invited to participate in an interview. This will have a semi-structured format and will last around 60 minutes. Where possible questions will be emailed to you prior to the interview so you have time to prepare for them. The interview (with permission) will be recorded, transcribed and analysed as soon as possible. You will be provided with the interview transcript for editing, and with the electronic record of the interview if you request these.
- You are requested to keep a daily diary about calls and incidents over five days, Monday to Friday. A form will be provided for this purpose. ICC management has agreed that you can take 20 minutes before the end of your shift each day to complete your diary. The information in these diaries will provide background information to the interviews.
- To gain more background knowledge about the context in which CSOs and immigrant representatives interact, I will observe CSOs receiving calls for two hours both before and after interviews. Care will be taken to be unobtrusive and not to interfere in the CSOs' activities.

### **Data Management**

- The data will be used within my Master's thesis and may also be published in academic journals. The identity of all participants will be anonymous.
- While all data participants provide are intended to be used for research only, the information will be subject to the Privacy Act 1993 and Official Information Act 1982 and therefore it is not possible to give an absolute guarantee of confidentiality. No CSOs will be named in the research write-up. Other INZ staff would only be named with their agreement. I realise that CSO participants could be identifiable by their employer in the study and every effort will be made to edit out from the report any potentially sensitive information gained by interview, diary and informal observation or by any other means. The same care will be applied to INZ staff generally.
- While the research is conducted, analysed and reported, the data will be kept in the researcher's lockable brief case and lockable office. No one other than the researcher and supervisor will be given access to the information.
- The thesis would be filed in the Massey University library. A request will be made for the thesis to be embargoed for two years. If it were intended to publish articles from the thesis the Department of Labour's Chief Executive (or representative) would have right of veto. At the end of five years the electronic recordings will be wiped and the written data destroyed except for the thesis unless consent is obtained from participants to store the data for a further time.
- A summary of the research findings will be provided on request by email from the researcher.

### **Your Rights**

*You are under no obligation to accept this invitation. If you decide to participate, you have the right to:*

- *decline to answer any particular question;*
- *withdraw from the study (before the diaries are started);*
- *ask any questions about the study at any time during participation;*
- *provide information on the understanding that your name will not be used unless you give permission to the researcher;*
- *be given access to a summary of the project findings when it is concluded;*
- *ask for the recorder to be turned off at any time during the interview.*

### **Project Contacts**

- Researcher - Alyson Scott, 145 Bay View Road, St Kilda, Dunedin 9012, 03 455 4330, [vanpetegemscott@xtra.co.nz](mailto:vanpetegemscott@xtra.co.nz)
- Supervisor - Dr Jocelyn Handy, School of Psychology, Turitea, Palmerston North, Room P3.16

06 3569-099, Ext 2055, J.A.Handy@massey.ac.nz

- You are invited to contact the researcher and/or supervisor if you have any questions about the project.
- This project has been evaluated by peer review and judged to be low risk. Consequently, it has not been reviewed by one of the University's Human Ethics Committees. The researcher named above is responsible for the ethical conduct of this research.
- If you have any concerns about the conduct of this research that you wish to raise with someone other than the researcher(s), please contact Professor John O'Neill, Director, Research Ethics, telephone 06 350 5249, email [humanethics@massey.ac.nz](mailto:humanethics@massey.ac.nz).

**Appendix I: Participant Consent Form****Massey University**

Te Kunenga ki Pūrehuroa



Massey University  
Private Bag 11 222  
Palmerston North  
4442

***“Kia ora and welcome to Immigration New Zealand.” A study of immigrant representatives’ experiences of using the Immigration New Zealand Contact Centre and Contact Centre officers’ experience of work.***

**PARTICIPANT CONSENT FORM**

I have read the Information Sheet and have had the details of the study explained to me. My questions have been answered to my satisfaction, and I understand that I may ask further questions at any time.

I agree/do not agree to the interview being sound recorded.

I wish/do not wish to have my recordings returned to me.

I agree to participate in this study under the conditions set out in the Information Sheet.

**Signature:****Date:****Full Name - printed**

**Appendix J: Call Observation sheet template extract. First call resolution  
(Department of Labour, 2011a)**

<b>CSO NAME:</b>		<b>DATE:</b>		<b>CALL SUBJECT:</b>				
CUSTOMER SCORES				TECHNICAL SCORES				
SUBCATEGORY	RATING	SCORE	NOTES/FEEDBACK	SUBCATEGORY	RATING	SCORE	NOTES/FEEDBACK	
Call Opening	N/A	N/A		Asks Appropriate Questions	N/A	N/A		
Listening Skills	N/A	N/A		Clarifies & Confirms Customer Understanding	N/A	N/A		
Voice Skills	N/A	N/A		Gives Out Correct Information	N/A	N/A		
Positive Attitude & Language	N/A	N/A		Maintains Positive Call Control	N/A	N/A		
Keeps Customer Informed	N/A			Updates Details & Makes				
First Call Resolution	N/A	<b>FIRST CALL RESOLUTION</b> - CSO identifies opportunities to educate the customer on INZ related services, policies or processes - CSO provides additional information and alternative options or channels to client - CSO seeks out opportunities to identify failure demand - CSO seeks out opportunities to add value - CSO actively looks to resolve most, if not all of query at first point of contact - At the conclusion of the call, it is unlikely that the customer would need to call back for further information						
Call Close	N/A							
Was the CSO Rude?	No							
<b>CUSTOMER</b>								
<b>OVERALL SCORE:</b>				<b>0%</b>				
<b>OVERALL COMMENTS</b>								

## Appendix K

### *Immigration Representatives' (N=11) - Main Themes*

Theme No.	Main themes
1	<p><b>Negotiating the complex immigration system (8 IRs)</b></p> <p>“Immigration is a minefield.”</p> <p>“There is a depth of complexity and a lot more policy options than there were 10 or 20 years ago.”</p> <p>“The issues are becoming more complex now.”</p> <p>“If you don’t read them [the instructions] really carefully you can be misled into thinking that something is permitted when it is not or is not permitted where it is because there are so many ifs, buts, ands, ors in the Instructions.”</p> <p>“Immigration isn’t straightforward at all. You know I have been working with it for quite a long time and I don’t find it straightforward at all.”</p> <p>“You see if you have got the straight line it is really easy, but if you have got something which is – which you have to clarify then it becomes a little bit harder.”</p> <p>“The common theme is that it is complicated and in some cases you need to use a specialist.”</p> <p>“They have been told to refer to the web page which scares them.”</p>

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**Inconsistent, conflicting and inaccurate information (9 IRs)**

“So I was starting to doubt myself quite truthfully by the time I got to the fifth person.”

“The policy has to be interpreted and everyone’s interpretation can be different.”

“It is no more bloody consistent now than there was 10 years ago.”

“I have contacted the ICC to question them on an issue knowing fair well the answer and there is only one answer, but the answer they have given is totally inaccurate.”

“The amount of people that say to me they ring the ICC, by the time they get through they speak to somebody, they get a totally different answer from somebody else.”

“There are always inconsistencies and I think there always will be. That is the nature of the beast.”

“So they contacted the ICC and they said they made about three calls and they got different advice each time.”

“They want to talk to someone who can help because sometimes ...we get two or three types of answers from different Call Centre persons.”

“I just had one recently with a Chinese couple and they rang Immigration and both of them had got so confused that they just came to me.”

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3

### **Try, try again (6 IRs)**

“Then I got a fifth person who answered in a way that matched the research.”

“I will ring back and that’s where you get the conflict. “

“So you ring back to get clarification only to be told something completely different.”

“You can ask one question of five different people and you will get at least three different answers.”

“Now if I am not happy you know with that I’ll go back and do some more research myself and then I’ll check again with the Call Centre.”

“So we call another time and we get another person and then we get another reply.”

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4

### **Asking the right questions (7 IRs)**

“But again it’s okay for me working within it but the general public overseas ones well they don’t know the terminology we use.”

“I don’t think the CC is that helpful to people who don’t have a reasonable understanding of the policy.”

“For me to get it across is no problem, but for general Joe Blow who doesn’t necessarily know all the terminology and all the bells and whistles that go with it, it can be very difficult.”

“I probably explain things a lot better than the client would.”

“No I think my clients ask the wrong questions.”

“Frequently with clients from some cultures you have to explore the issues with them to get all the little details that will make all the difference because Immigration Instructions have so many caveats.”

“Then you have to go to the right person to ask for the Language Line. That is the main objection what they see. It is the language barrier.”

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5

### **Serious consequences of information (10 IRs)**

“The migrants themselves are then going and acting on that information given which often is not correct.”

“The people who call in are quite often people who will accept any government authority as being true blue so they take it as fact and they go along and follow whatever instructions or advice they were given and this is where they run into problems.”

“Um this is about people’s lives. It isn’t just a “Let’s ring up the helpdesk whether I have got the measles or something”.”



“Immigration is a specialised area and the information and advice that someone gives can have a direct and long lasting impact on someone’s life and one needs to be well versed in policy.”

“CSOs should gain experience in the branches. It would highlight the significant affect of the decisions made by INZ on people.”

“CSOs are important as they affect the decisions of people about whether to migrate or not. It is important they take time with people and be empathetic.”

“It is important to check every aspect of a case before you advise on their eligibility for a visa.”

“That is all they want. Straight, honest information.”

“They have got to learn somewhere but they shouldn’t be on the end of the phone in that important function since that is the first port of call for a lot of the clients that we deal with.”

“Well they are pretty good and you get kind of a mixture of problems so you get somebody who can’t help and they won’t go anywhere and someone that can’t help and they will go to their supervisors.”

“I used the Call Centre quite a bit, but since then I have built up, I suppose, a rapport with the various case managers throughout the country.”

“We are lucky because we have got some really good people down here. We’ve got the manager’s number and email and all that kind of thing.”

“I contact them very seldomly because my main use to contact them is to find out if an application that has been tendered, if it has been allocated to a processing officer and if it has, what is the application number and who is the processing officer.”

“I used to bug the hell out of the Immigration Officers because if I could get directly to an Immigration Officer and say “Hey look I have got this situation have you got a minute” and run it passed them rather than the call centre.”

“I built a list of case officers to call instead.”

“We have got some persons in [branch]. We don’t call them any time but if in this type of situation and when we are getting this type of thing and we need clarification yes.”

“Once I found out people’s direct dial numbers I rang them directly because it was just so much more efficient.”

“I have got good contacts amongst highly specialized people who I trust and who can give me pretty good insight into what kind of things need to happen to actually get the application over the line.”