SUPERIOR SERVICE

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Moving Contact Centers from Planning into Action: The Frontline Leader's Role

By Tim Montgomery and Sharon Fernandez

Does your leadership team inspire continuous improvement? *Ideas to drive a customer-centric view of your center's performance.*

Contact centers are often the major link between companies and their customers. It is the contact center that can drive the customer to be an unwavering fan or a discouraged critic. And it is the experience provided to the customer by the contact center that separates the best from the merely passable. Interestingly, most contact centers are not created to be this customer service champion; instead, they evolve from changing needs of the organization. Many companies discover they have become a contact center when they still thought they were just a retailer, bank, utility or other organization.

To run a successful contact center, managers must understand and leverage their people and technology in new ways. Our technologies provide a tremendous amount of data, and the best organizations utilize this information to transform the business. With so much data available, leaders can become engulfed in reports, scorecards and dashboards without seeing any real improvement in customer service. Or worse, the customer experience can fall even while scorecards suggest otherwise. What data to focus on is driven by the metrics identified to evaluate and improve the organization—but what drives the metrics?

What follows are some new ideas on how to help

your organization transform from a pure metrics-driven operation to one that constantly seeks new ways to funnel leadership influence and inspire action that fosters continual improvement.

Getting a Move On

A good way to get everyone moving from planning into action is to ensure that all leaders are focusing on the right things with a clear understating of why it's important to the organization and customers. Here are three key questions that must be answered and known by all to ensure that you're prepared to start implementing ideas:

1. WHAT DOES THE CUSTOMER REALLY WANT FROM THE CONTACT CENTER?

We often lose sight that we're all consumers—everyone who works in customer service is a customer, and with that comes a tremendous amount of experience and expertise. Many companies that we've worked with spend countless hours trying to figure out what their customers want without tapping into their own experience as a customer. We often approach our own product or service through the company's eyes and have a hard time looking

beyond the organizational chart for solutions.

The best organizations create cultures that allow leaders to move from thinking about internal silos to thinking about just being a buyer, consumer, customer and recipient of service. When you're able to make this mind shift, you'll find that customers are pretty simple and just want a few key things:

- **Promptness and accuracy.** Get to me quickly and don't make me wait too long. And once I'm being serviced, I need you to do it right.

- **Quality for the time invested.** My investment in your company is time. My time is valuable. I'd like you to respect the fact that I am taking time out of my life to work with you, and I expect a return on that investment.

- **Real first-contact resolution.** Let's try to get this done the first time without any further action on my part… meaning, I just want to tell you my problem once and have you find a way to fix it. I don't care about your internal silo, relationships or departments—just go do it when I tell you.

- **A choice in automation.** This isn't my first time doing this; I know what I can do myself, and I'm calling you to talk to someone because I know that I need to. Let me decide how I want to interact with you—after all, as the customer, I have the choice to go elsewhere.

2. ARE WE MAKING IT EASY FOR OUR CONTACT CENTER AGENTS TO DELIVER?

Once you begin looking at your organization through your customers' eyes, you can zero in on the actions that will tell you how your customers think you are doing and what you need to improve.

Take the time to step through the actual interaction from the customer's perspective. Don't take shortcuts because you assume you know how things work—actually do it. Start with calling your own number and walking through the IVR prompt options looking for quick wins. How quickly can you get to an agent? Do the options make sense to someone not familiar with the

company? Are the voices uniform throughout?

Once you've made it easier to get to your agents, move to the service interaction and evaluate calls—not based on your internally developed quality form, but focused on what the customer is really telling you about their needs, your company's ability to meet those needs, and how the customer really feels about interacting with you. You'll find areas that are missed in your current metrics that better reflect your customers' satisfaction with your organization.

Review all of your current metrics and ask, "Does this accurately tell me if I'm meeting my customers' expectations?" Look at those results from periods when the service levels were dramatically different. If the results don't change much, you're probably fooling yourself about how well your center is performing.

Continually ask, "why?" along with, "why not?" Doing this will provide you with a clear understanding of the roadblocks hindering a positive experience for your customers. Organizational barriers will quickly become apparent. Most companies are full of processes without a clear understanding of how they started or why they exist. Many of these were developed to address company concerns without including a customer perspective. Although they might make things easier for you, they make things harder for your customer—maybe even so difficult that your customer will choose to leave.

3. DOES EVERYONE KNOW THEIR ROLE IN DRIVING IMPROVEMENT?

Once you've completed a review from the customer and company perspective, you're likely to have a lot of new ideas on activities you'll want to start (and stop) doing. It's important to remember that you can have too many items to improve. You need to identify the key changes that will have the most impact and that can be linked directly to drivers in order to measure improvement. Key to getting the most from your contact center is buy-in and action from the frontline agents. If your contact center employees don't understand how they can specifically influence a result, then it's not a goal you should share with them.

In order to truly gain momentum and drive positive change you need to do a few critical things:

- **Focus.** Often, we're so wrapped up in the

numbers that we forget about what is driving the numbers: people and their behaviors. Identify the behaviors that drive your goals and review them. The ultimate objective is to have a better grasp of why things move.

- **Understand.** Once you know the drivers, you can begin to drill and document the root causes. Focus less attention on numbers and look harder at the reasons the drivers positively or negatively influence results. Engage your team from the front line up to really understand why they do what they do. This helps to focus everyone on what needs to be different.

- **Plan.** The root causes point us in the right direction, but moving anything takes planning. This is one thing that most people know, but for one reason or another don't do. It doesn't have to be formal or scary—just simple documentation as a checklist to ensure that you're on the right track.

- **Communicate.** You can only change your results by changing the behavior of your team. They must know the expectations and feel accountable for delivering on them; thus, you must clearly define what you want and how you will measure it. Again, keep it simple: It's less about the formalization and more about the communication.

- **Measure.** Consistently check the pulse on the goals you have decided to focus on. Share the results with your staff so they can see how they are doing. Tell them what is meeting your expectations and what still needs work.

- **Repeat.** This is when the process becomes continual. At this point you may discover many things: You're focusing on the wrong cause; your expectations aren't realistic; you're driving another metric in the wrong direction; you're on the right track and need to accelerate, etc.

The key is to not worry about getting it right the first or second time… it's about continual improvement.

It Takes More Than Just the Front-line to Execute Effectively

"Senior management just doesn't understand." That's a battle cry heard time and again from contact center leaders who have gone through the steps and identified opportunities. The opportunities identified in a process improvement initiative often require a resource (time, people, money, etc.), and this requires sign-off from senior management. The recommended response is always the same: It's the job of contact center leaders to get them to understand. You can't stop until everyone appreciates the value and dynamics of their real-time inbound environment and how small changes in that environment can have tremendous impacts on the top and bottom lines." The easiest solution is making it happen in targeted, digestible chunks. We've worked with many smart people who, for one reason or another, have adopted a "keeping your head above water" approach to contact center management.

The truth is that many senior executives with contact center responsibilities have never run a contact center. In many cases, they're focused on other organizational issues that pull them away from gaining a true understanding of our challenges. But that's not a bad thing—it actually makes it a lot easier to transform their opinions.

Lay the Foundation By Getting Yourself Up to Speed

First and foremost, you need to be on top of your game. Make sure that you are able to intelligently describe the tactical stuff, and make the connection between the contact center and the value it brings to the company. Yes, to get buy-in from others, you have to become a student of contact centers and continually look for ways to sharpen your own skills.

Don't try to reinvent the wheel. If you're reading this, chances are you're looking for new ideas, which is a great first step. Make sure that

> **"Organizations don't execute unless the right people, individually and collectively, focus on the right details at the right time."**
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> *– Execution: The Discipline of Getting Things Done, by Larry Bossidy and Ram Charan*

your knowledge of contact centers is not only accurate, but current, as well. Attend conferences, seminars and training courses that focus on the basics of contact center management, or take more advanced courses on strategy and technology. (There are several organizations that offer these types of programs.) Another way to keep abreast of the latest trends is to subscribe to—and actually read—as many industry publications as you can.

While you're getting yourself up to speed, try to get a feel for what your senior management is reading. Many times, their ideas and strategies are derived from popular business books and periodicals that are not related to contact centers. The next time you're in a senior manager's office, look to see what newspapers, magazines and books are laying around—and then get a copy for yourself. You'd be surprised by how many ideas and theories from mainstream articles and books can be applied to the contact center environment. The best part is, you can use it as point of reference the next time you have an opportunity to "talk contact centers" with the boss.

Once you get senior management onboard, everything else becomes easy. Keep focusing on the value of the contact center and pointing everyone back to the customer as the driver of all improvements. Anyone, at any level, has the ability to drive change in a contact center. The key is to never give up and to keep encouraging everyone to view things from the customer's perspective. The best contact centers know that you'll never grow until every agent knows what it really feels like to be on the other side of a call. And every organization has several ways to make this happen—you're only limited by your imagination and creativity.

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