LEADING THOUGHTS

By Tim Montgomery,
Cooney Solutions Group

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Real-Time Queue Management

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**Planning
and access
to the right
information
is the
key to
meeting
customers'
real-time
service
expectations.**

Every call center is unique, but they all have a common thread — the way in which the work arrives. Calls appear in a continual, random pattern and must be answered within seconds of delivery. To address this challenge, many call centers have implemented creative forecasting, planning and scheduling processes. No matter how effective this process, at some point, the incoming calls will outweigh the workforce and calls will queue. Typically, this is when the fun begins and everyone's life seems to change a little. A commonly overlooked fact is that queues are part of the plan and not necessarily a bad thing. Unless you have a service level objective of 100% in zero seconds, you're planning to allow a certain number of calls to enter the queue. Managing queues is what your automatic call distributor (ACD) is designed for — it grabs those calls that can't be answered immediately and holds them until an agent becomes available.

An effective real-time queue management program is essential to running an efficient inbound call center, but it's often the piece that's left out of the planning process. Following are a few considerations for establishing or updating a real-time recovery program.

Continually Update Your Real-Time Plan

Your ability to institute a successful real-time recovery program starts with an effective planning and scheduling process. This process must include the ability to look ahead to the coming week and identify the intervals that lack the minimum number of phone agents required to meet your service level objective. This capability is a common component of most workforce management systems and can be manually tracked via a spreadsheet or database application. If you do not have a process in place that allows you to look ahead and review staffing gaps by interval, you should implement one before moving forward with a real-time recovery plan.

Once you have a process that allows for ongoing staffing gap analysis by interval, it is important to keep it updated. If you create schedules several weeks in advance, they need to be continuously updated with all changes that will affect the number of employees planned for incoming calls. This includes changes to the volume forecasts, last-minute agent training/meetings, short-term disability, etc.

Last, and most important, your plan must be updated with the last-minute changes first thing in the morning (e.g., sick leave, broken-down cars, sick children, etc.). This will give you an accurate picture of the workforce availability and will provide you with ample time to review alternatives for any intervals that look hopeless. Your current day planning does not end after your initial morning update. Additional unexpected events will influence your workforce throughout the day and the plan must be adjusted accordingly.

Communicate Expectations to the Front Line

The key to a successful real-time recovery program is the communication of expectations. The first step is to develop a process of communicating the expected workforce variances and any last-minute changes to the plan. This can be accomplished by consolidating the expected workforce variances by interval for an entire week on one spreadsheet. The spreadsheet, along with the ongoing updates, could then be emailed or posted on an intranet site. Providing this continual "snapshot" of the workforce and workload distribution by interval will eliminate many of the queue surprises that tend to catch everyone off guard. If the snapshot shows fewer people staffed than needed to meet the minimum service level, the odds are that you're going to have calls in queue and everyone should be prepared.

Once the plan is communicated to the front line, expectations should be clear as to what actions are to be taken. If you have crosstrained agents who can handle response time activities (i.e., email, fax), you may have them log onto the phone once your queue threshold has been exceeded. Better yet, in the intervals when the plan is at a significant deficit, you could have them log onto the phone in advance and avoid the painfully long process of driving down the queue. You'll need to recover the time lost against the response-time activities and move phone agents into non-inbound modes during intervals when the plan illustrates excess capacity.

Don't Base Actions on Static Numbers

Once you've defined and communicated the actions to be taken, you will need to determine when the program should be implemented and when to escalate to the next level. Using static indicators as criteria for implementation will result in over- or underreacting in many cases. For example, let's say the first phase of your plan is to begin when your expected interval-staffing

shortfall is at negative five. A staffing deficit of negative five will result in significantly longer hold times when the required staffing is 20 than it will when the required staffing is 40. Using a single number as your threshold tends to mask the urgency in your lower volume intervals. A good method for setting your proactive adjustment threshold is to use a percentage approach — plan to invoke different phases based on the deficit percentage and not a static number.

This same approach should be used for those intervals when the calls don't arrive as planned and you need immediate help. You'll first have to work with an Erlang program to get a feel for the "planned" number of calls in queue based on the expected volume for the time of day. Next, determine how long the threshold can be exceeded before enacting the plan. It'll take a few attempts to get this right but, once established, it will definitely reduce the number of "hair-on-fire" events.

Monitor By Skill Group, Not By Team

Your real-time recovery program and ongoing gap planning should be done at the skill level or the highest level of group overflow. Managing this activity at a team level, when calls are shared with other groups or sites, becomes a coordination nightmare. This activity should be monitored at the same level in which the volume is forecasted — your schedules are created against this forecast, so all real-time updates and actions should follow the same process.

With the addition of new media, many call center agents have moved from call handling to other interactions, such as chat or email. In some cases, their workload has shifted to handling only the new media. It's a good practice to keep an updated list of all people who have been trained in telephone skills and who can be called upon on short notice. You should also have an alumni list of people who have migrated out of the call center to other parts of the organization and who can be counted on during emergencies.

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Educate to Eliminate the "Attack the Queue" Philosophy

Queues are a necessary part of the plan to take full advantage of the efficiencies gained by implementing an ACD. As call centers evolve and establish service level objectives, rewards and punishments based on these objectives quickly follow. To ensure that these objectives are consistency met, many call centers establish what is best described as an "attack the queue" approach to meeting service level. When fully implemented, this approach has everyone in the organization panic-stricken when calls are in queue, and all other activities in the center are put on hold until the queue is driven down to zero. Typical results from this approach are higher-than-desired service levels, lower-than-expected workforce efficiency, agent and manager frustration and continuous non-telephone event rescheduling.

Overcoming this mindset is not an easy task, and to sustain it, you must have buy-in from the top of the organization. This requires educating everyone who influences the call centers results — from frontline agents to the senior executives. Don't worry, you don't have to train everyone to be a call center expert — a simple presentation that outlines what it means to work in a call center is a good way to get the ball rolling. One thing you should do before the presentation, though, is to develop a communication on your organization's service level objective (e.g., definitions of the inputs, expected queues length, average answer speed translation, impact of one agent, etc.).

By making just a few changes to your real-time recovery program, many of the unpleasant tasks associated with running and working in call centers become much easier.

LEADING THOUGHTS   *Real-Time Queue Management*

Five Attributes of the Best "Real-Time Customer" Call Centers

Customers are now in control of business, and today's call centers have the unenviable task of meeting and managing customer expectations that are moving at a lightning-fast pace. The shift in control began with companies' increasing reliance on the Internet, which has given birth to a whole new host of customer complaint (and accolade) tools — e.g., blogs, audio files, YouTube videos and customer-powered Web sites that focus on satisfaction and dissatisfaction with specific products and services.

Many companies lack the ability to keep up with the new pace of change, and the old ways of establishing yourself as a service leader are no longer effective. What follows are ideas on ways companies can refocus themselves on the new "real-time" customer and use customers in new ways to provide the organization with valuable information on what's really happening. By appreciating the real-time customer and understanding the right things on which to focus, companies can position themselves for success in this new era of service. Best of all, the call center is well positioned to be the key enabler of success in this new era of customer control.

1. They are proactive in providing resolutions — no complaint required. Let's face it, most customer service activities are not generated by a customer that just wants to commend you for providing a wonderful product or service. The call center is generally the place the customer looks to for help with issues or problem resolution. Armed with this realization, the best call centers are finding new ways to get out in front of the issue — using real-time information to generate proactive resolutions. How? When you see trends from a certain customer profile, do something in advance. Don't wait for an issue that impacts a small portion of your customers to become a problem for all of your customers. If you do, everyone will suffer because of the increase in volume.

2. They are focused on employee loyalty as much as on customer loyalty. It's amazing how many times the same story gets written — happier employees provide better service. Unfortunately, many call centers forget this and spend their time focused on increasing customer satisfaction scores while trying to control the agent efficiency metrics. This often results in a vicious cycle that features a lot of finger-pointing with very little improvement in either customer satisfaction or agent efficiency; in fact, both often move in a negative direction.

The best companies treat the agent position with the respect it deserves — viewing agents as "voice of the company." You have to spend the time understanding what your employees want. You'll find that call center reps are pretty simple: They'd love to come to work and have some expectation of their daily workload, be provided the tools to be successful and have more flexibility. All this can be accomplished by moving from managing the queues to managing the process.

3. They are visual in their dedication to customer service and the people who provide it. Celebrating your wins is a key enabler to successful customer service. Call center gents have several "wins" every day that should be discussed,

documented and rewarded. It starts with helping agents to see things from the customer's perspective, then, empowering them to make decisions and make a difference. Let agents know that it is okay to make mistakes as long as the best interest of the customer is the root cause. Be sure to reward the effort, and to share successes with others.

Meetings with agents are often driven by a new initiative or a desire to "educate" them on everything that has happened since the last meeting. A great way to create a "visual" dedication to service is to schedule quick daily or weekly "win" meetings, where the entire team can tell others about the wonderful things they did for customers since the last meeting. Everyone learns and starts to see the value of going above and beyond. The leadership team can reinforce this by making wins a part of their daily discussions — followed by rewards and celebrations. The best part for agents is that they'll quickly realize they are in control of their own wins and that they have several opportunities to win every day. Everyone benefits — the agents, the organization and, most importantly, the customers.

4. They are in-touch with their customers' real feelings and involve them in products and solutions. Top call centers pay more attention to what their customers are saying on blogs, YouTube, discussion forums, etc. These customers used to be dismissed as "complainers" and not the "target" audience; today, however, they are viewed as the real influencers. Their postings often point out the real problems and opportunities that don't show up in customer satisfaction survey results.

One of the best ways to really understand how your customers feel is to send them a three-question survey: 1) What did you like about the last interaction; 2) what didn't you like; and 3) what can we do better next time? Then, once you hear back from customers, follow up and do something... real-time.

5. They are fanatical about leadership and provide the tools for success. Call centers do a significant amount of internal promotion — moving agents into supervisor or management positions, but few call centers have the luxury of formal one-on-one development or mentoring programs to grow new supervisors. Most find themselves at the lower end of the maturity model — few people in the organization with a formal understanding of the foundational requirements of call center leadership, which makes it harder for new and upcoming leaders to gain a full appreciation of what it takes to effectively navigate the call center waters.

Every organization should develop a formal on-boarding program for new leaders — a plan that outlines the training programs, policies and evaluation criteria. By documenting the expected activities and holding monthly progress meetings, your new leaders will be engaged in the activity that makes every person (and organization) better — continuous improvement. Once you've done it just a few times, you'll create the internal mentors with the expertise to transfer the right knowledge to your upcoming leaders.

ABOUT US

LEADING THOUGHTS

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Enabling
Customer Loyalty

Toning up customer loyalty: There are no short-cuts to a healthy customer-centric culture. A consistent focus on diet and exercise is the only way to get the results you want.

Leaders with contact center and customer service responsibilities seem to be on a continuous quest to find the "secret sauce" — that special something that will allow them to move their organizations closer to the customer while growing the business. Most leaders understand that the days of just focusing on customer satisfaction are gone; to grow your business, you have to focus on customer *loyalty*. Loyal customers feel valued and proud to be associated with your organization — and they are the most effective (and cheapest) form of marketing. While many companies claim that they are "customer centric," few are able to move the people they serve from "satisfied" to "loyal."

The challenge for most managers lies in moving the organization from being focused on customer service to building service around the customer. To foster and sustain such a culture, you need to ensure that everyone in your organization is ready for their "moment of truth," no matter when or how it's presented. This is no easy task — don't expect to be able to achieve it immediately following a mandate from the executive level.

In our work with customer service leaders, we've found that the best managers fully understand that loyalty comes from a continuous focus on and reinforcement of a customer-first strategy. Organizations known for providing "world-class" service have a culture built around the customer; every decision begins and ends with the customer impact in mind. This means that changes and updates to tools and tactics are frequent to match ever-changing customer demands and expectations.

We compare this to how an adult maintains health and well-being; it's not about quick fixes or the latest fad — it's about a continuous focus on "Diet and Exercise." You are probably asking, "Can the proverbial quest for customer loyalty really be completed by following the same steps we follow to maintain our physical health? While the answer is "yes," the execution is the difficult part.

Just about every adult has at one time or another decided to go on a diet or to start exercising more. And most have experienced early progress after their decision; they stick with a routine for a couple weeks, see improvements and feel better about their decision. Unfortunately, just about every adult has regressed after straying from their routine. Many are on a continuous cycle of diet and exercise because they feel great about their accomplishments — so good that they start to take some things for granted and they stop paying the same amount of attention to the activities that got them feeling better.

We see the same phenomenon in companies that are focused on building customer loyalty; they start to see gains, then take their eye off the ball and begin to focus on other activities. When this happens, the front line forgets what to do during their "moment of truth," and the customer gets caught in the middle.

Let's examine further this notion of diet and exercise with regard to customer contact organizations, and look at what you can do to develop a healthy culture focused on consistency, customer loyalty and employee delight.

All Diets Start with a Reason

Some people were brought up in an environment where a healthy diet and plenty of exercise were top priorities. For others, it takes a life-threatening event (e.g., a heart attack) to make them focus more on their health. Whatever the driver, to sustain positive results we must continue to focus on the basics and often revisit the reason why we're doing what we're doing.

This is no different in organizations; some are built on a culture of service and others get forced into it because the bottom line is ailing. And just as adults need a little push to help them stick to their regimen of diet and exercise, organizations need reminders to keep them motivated and focused on improving loyalty.

However, motivation by itself isn't enough; all the desire in the world isn't going to get you very far without a plan. In today's competitive market, companies known for providing world-class service develop formal strategies to keep pace with an increasingly demanding consumer. But even before creating a specific plan, a company must have a culture in place that emphasizes the customer as the key to success. In the companies that we've worked with, several key ingredients were missing at this step of improvement, including the following:

Culture isn't part of the daily discussion at any level of the organization. In fact, it's often missed altogether as leaders jump directly into trying to improve customer satisfaction by making changes with regard to people and processes. While such changes can provide short-term improvements, those improvements will never be sustained without developing a culture that is focused on service, and until everyone in the organization understands what it means to serve. Developing and sustaining a culture of service starts at the executive level of the organization and finds its way to the front line. Unfortunately, most companies try to make this happen in the reverse direction.

Too much focus on and reaction to the daily metrics. The numbers are tied to actions, and depending on what the metrics look like at the beginning of the day, leaders and employees at every level will refocus their efforts. On the surface, this doesn't sound all that bad, but we forget that the customer is caught in the middle of the change. If we're continuously refocusing our efforts throughout the day, the customer's experience will never be consistent, thus causing them to question the competence of the organization and whether the organization values them. The key is to ensure that everyone understands what the metrics really mean from the customer's perspective, and make improvements that are transparent to the customer.

Financials get more attention than service. Most organizations pride themselves on growing their revenue, income or stock price. A negative swing in any of these becomes an immediate motivator for improving customer service. Unfortunately, the financials alone don't really

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indicate whether you're providing great service, and they often put additional pressure on those tasked with delivering the service. The best companies focus on service first, with profits following.

It's difficult to lose weight in a house stocked with donuts and potato chips; similarly, it's difficult for companies to improve customer loyalty without ridding the contact center of the things that distract from the customer experience. Begin with the basics — ensure that everyone will be given the opportunity to succeed. It all starts and ends with culture.

Tracking Your Improvement Requires a Scale

Dieters typically measure progress by getting on a scale or measuring their waistline. For us to know how we're doing, there must be a starting point and regular checkups along the way. The good news with diets is that the improvement targets are easy to measure and track.

Most companies think they know what to measure to improve service, but they often come to realize that the customer's moments of truth can happen in many places with several systems and with the help of various people. Pulling all of this together is often the big stumbling block in creating the customer service scale. We have often found ourselves helping managers to break down the organizational silos that prevent this from happening.

Most organizations have a tough time balancing the different work silos, thus creating multiple pain points for the customer. For example, we worked with a bank that had a 30-day mortgage loan processing turnaround for customers, but, internally, it only took only about five hours from start to finish. What was the reason for the delay? There were multiple organizational silos (intake, processing, underwriting, validation, etc.) — each with its own leaders, service level objectives and focus. All of the silos were relatively successful against their own measures, but the customer's overall experience relative to time and communication wasn't a priority for any of the departments. By moving the primary metric from departmental success to customer success, the organization had a better understanding of the overall process gaps that were ultimately felt by the customer, but that were blind to the organization.

The only way to develop a good scale to measure service improvements is to begin by looking at all of your processes through the customer's eyes. Once you gain that perspective, the reason to build silos around the customer rather than the company will become obvious, and you'll begin to get the real information needed to measure improvement.

You Can't Lose 20 Pounds in a Day

Healthy weight loss happens a few pounds a week. Sure, you may have heard stories about people who have lost 50 pounds in a month by following a new, "revolutionary" diet program, but such weight loss can be dangerous, as well

Enabling Customer Loyalty

as very difficult to maintain.

When following a sensible diet, there will be weeks when nothing changes and, thus, it's easy to get discouraged and stop believing in the plan. If we go two weeks without losing any weight, we start to change our plan or, in some cases, we just give up and go back to the way things were before. It's no different in call centers — nothing is going to change overnight and there will be weeks (or months) when we show no notable improvement.

For call centers, it starts with a well-defined plan that includes daily doses of customer feedback. It's critical to be in touch with your customers and understand their expectations. Customer satisfaction ratings are important, and help to identify positive change in processes and areas where change is needed.

Often, customers' expectations shift faster than the organization's improvement processes. We've seen this happen with several companies that get so focused on their internal customer service measures that they never stop to ask their customers if the bar has been raised by someone else. You may be getting all "5s" (or "7s" or "10s") from your customers based on the way the survey question is worded, but customers may be ready to give more business to the competition. Remember, today's consumers demand that all companies provide the same (or a higher) level of service as the last company they interacted with — regardless of industry. You're no longer measuring yourself against the competition; it's all about the customer's last interaction.

As important as it is to understand the yardstick measures, it's even more important to stick to the plan you developed at the beginning. Approach your customer improvement just like you would any other long-term change in your organization. Assign a champion and provide them with the resources and leverage to see to it that the plan is carried out. If you've approached this in the right order — getting the top-down culture right, adjusting the measures from the customer's perceptive, and realizing that the bar is ever-changing, you'll be well-positioned for success.

Keeping the Weight Off Is the Hardest Part

We've all known people who have achieved a weight-loss goal only to rebound a few years (or months) later. In many cases, this up and down is just a part of their life — the scale is always moving in one direction or the other. While the physical changes are obvious, medical experts will tell you this variance can be harmful to your body.

In business, such variance can be felt by customers, who see the fluctuations and inconsistencies and begin to question the organization's strength. Controlling the variance is key to creating a customer-focused organization. As we previously mentioned, the companies that are renowned for providing great service and who have loyal customers follow a continuous regimen of "diet and exercise." Once they raise the bar to meet their customers' desires, they develop programs to maintain their focus via daily exercises in commitment and a balanced diet of customer feedback. These companies know that their agents are the key to success, and they're continually reinvesting in them in ways that enhance the agents' ability to delight customers with outstanding service. The leaders in companies that focus on proper "diet and exercise" know that they set the tone for everyone, and place more importance on service than on financials. The customers of these companies feel so passionately about their relationship, they get involved by providing new ideas for growth and improvement. And the employees of these companies feel proud to provide service, know their opinions matter, and receive continuous coaching to keep them on the plan.

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ABOUT US

LEADING THOUGHTS

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Moments of Truth:
Drive Organizational Value through Every Interaction

Are your processes distracting frontline agents from providing world-class service?

Achieving world-class status is something that most call center leaders strive for, but rarely experience. Only 5% of companies attain the "world-class" category, according to a recent study by a leading service organization. The majority (80%) fall into "average" or "below average" status.

Most want to achieve greatness; they simply don't know how.

World-class companies have reached a level that 95% of their competitors have not. Many of those competitors are, in fact, very good — and that is their downfall. Marketing expert and author Seth Godin captured the root of the problem well. He commented that: "The opposite of remarkable is very good. Very good is an everyday occurrence and hardly worth mentioning." By focusing on the activities that have made them very good, they are distracted from those actions that would allow them to become remarkable.

We often find call centers placing too much attention on numbers and technology. Though both are important, such an approach can cause the center to miss the real opportunity that presents itself hundreds or even thousands of times each day.

Focus on Giving Customers What They Want

The first step on the journey to providing remarkable service is to focus on reality. Unlike Stevie Wonder's '80s hit song, customers don't just call to say I love you. They have real issues and they expect you to solve them. Customers call with high expectations that your business will provide them with accurate information in a timely and courteous manner.

If your agents can provide the desired service quickly with high quality and a smile, there is a chance they can exceed the customers' expectations and deliver a remarkable service experience. But no matter how fast the phone is answered or how friendly your agents are, if the problem isn't resolved, your organization will not exceed the customer's expectations.

Can your agents provide a caller with world-class service? Of course, most can. But can most of your agents do that on every call, 50 times a day, five days a week, 50 weeks a year — 10,000 times? Even for "very good" companies, the answer is a resounding "no." Only in world-class companies does service meet or exceed customer expectations consistently. These companies are doing things a little differently, and their reward is customers who love them.

Getting callers to believe that they love your business is not easy — after all, love is a pretty strong word. When we talk about a customer's love, we're really talking about customer loyalty. Would your customer leave you? The goal is to achieve such a strong service relationship with your customers that your company represents the standard that other organizations must strive to meet. You then have real "stickiness" with your customers.

Today, with the Internet and all of the different

vehicles that enable customers to both praise and speak ill of companies, loyalty is taking center stage — and the centrality of customer loyalty to business success is borne out in industry metrics. More and more companies are looking to create Net Promoters (customers who would recommend your company to others). That starts with making customers fall in love with your organization — so much so that they feel compelled to tell others that they love doing business with you.

Is Your Call Center Ready for the Moment of Truth?

Think about the companies that you love — most people have two or three. If you consider why you love doing business with them, you'll find that you can usually identify specific behaviors that they demonstrate, which you can use in your call center. It generally involves the "moment of truth" — addressing each customer's issue as if it were the most important.

In call centers, we tend to focus on the high-level strategic plan and initiatives. We spend a lot of time talking about all of the really cool call center technology that's out there. While you do need to have the right technology, such tools only help us to prepare for each moment of truth.

Why is the moment of truth so crucial? Customers who are merely satisfied with the service they receive are still at risk. Customer expectations are ever-increasing, and thus, "being satisfied" is no longer sufficient to win in today's highly competitive business world. Customer satisfaction is an *enabler* to loyalty. To achieve actual loyalty, your center has to be ready for every single moment of truth — and that means all of the 50 calls, 50 emails or 50 chat sessions handled by each agent every day. Amazingly, the average agent has 10,000 opportunities each year to create and influence customer loyalty. Each of those can have a ripple effect, especially if the customer is not satisfied.

As you develop your service delivery strategy, a key question to consider is, "Am I preparing my front line to provide the level of service my customers expect for every moment of truth?"

Customers' Expectations Are Evolving

Your agents need the right tools, knowledge and focus to provide service that exceeds customers' expectations. But what are those expectations? Changing customer service practices and attitudes, especially with regard to call centers, have been exemplified through highly visible media coverage by publications such as *BusinessWeek*. In March 2007, the magazine ran a cover story on "Customer Service Champs," which featured a ranking of the top 20 customer service companies in the United States. The article highlighted all of the things that these companies did to provide excellent service and foster strong customer loyalty. Fast forward to March 2008. That year's issue on the same topic also included a ranking of the top 20 customer service providers, but the cover article, titled, "Customer Vigilantes: Fighting for Truth, Justice and the Right to Speak to a Manager," focused on frustrated and fed-up customers empowering themselves by taking control of bad service experiences.

Customers' requirements are changing faster than ever before, and companies need to keep pace. Customers know that they are in control, and they are demanding that organizations pay attention to that fact. They demand that each moment of truth meet their needs, and they're willing to go to incredible lengths to get results.

Accessibility Sets the Stage

Many companies erroneously fixate on service level accessibility. They focus on achieving a certain metric, and believe that this makes them world class. It's true that customers expect their service to be timely, thus, accessibility is important. However, customers are impressed that you solved their problem, and even more impressed if they didn't have to wait long for you to do it. If the core request — solving the problem — isn't addressed, the customer cannot move on to appreciating the speed with which you answered the phone. It's a great example of putting the cart before the horse.

Even so, having agents available when your customers call does underscore the customers' value to your organization. To that end, be certain to have agents available during every interval throughout the day. Failure to do so will not only prevent you from achieving world-class status, but it can also put each of your customers at risk, since poor service levels send a message that you don't value them. You're not only wasting your customers' time; ultimately, when you do the math, it also costs *you* more.

If you have an environment where the door is not "open" when you say it will be, customers typically will wait, hang up and then call back — getting more frustrated at each step. Meanwhile, your agents have to contend with that frustration. Consequently, they feel undervalued and also become frustrated, resulting in high employee turnover and low customer satisfaction and loyalty. But it's important to remember that having a great service level objective in place is only an enabler to customer loyalty — it won't get you to world-class by itself.

Not Everything Has to Be a Number in a Call Center

The front line is where the moment of truth occurs for the customer, and it's where customer

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Get Key Players Involved in the Discussion

Company leaders must view the call center for what it really is: a "process improvement incubator." With 10,000 moments of truth per agent per year, there is huge opportunity — and every contact has value.

The best companies focus on their customer/agent interactions and realize that each contact is not just a way to delight a single customer. With the proper attention, a single interaction can provide feedback that helps to delight hundreds or thousands of customers in future contacts. It starts with asking some basic questions of every single contact:

- How did this work?
- What did we do to solve the issue?
- What else could we have done to improve the customer experience?

It's essential to take what you learn from individual moments of truth and apply that knowledge across the board.

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loyalty is built. Your business objectives must clearly focus on what is most important, and agents must have influence over how their job is designed. How can your staff be the voice of your customer, the face of your organization and the enabler of customer loyalty when they believe that:

- "We are always the last to know."

- "We have no flexibility in our environment."

- "Management over-measures everything, whether it's important or not."

These are the types of complaints that agents share. They are the road blocks to providing excellent service, and the reason why so many agents do not feel engaged. Your agents cannot deliver during moments of truth if they are not engaged, and often the numbers we share with them cause them to be disenfranchised rather than engaged.

Great customer service companies boast high levels of agent engagement. Research also has shown a direct correlation between employee engagement and increased revenue and profitability. Happier employees provide better service. It's as simple as that. You can give agents all of the best tools and training, but if they are not engaged, your customers will feel it, and loyalty will suffer.

Convert Agents into Customer Experience Engineers

To truly engage your agents and empower them to continually improve their performance, as well as the center's, you must help them to view their job differently. Agents have to see themselves as "customer experience engineers." Agents who adopt this customer-centric mindset instinctively think about how they can solve each customer's problem, and more importantly, what they can do to improve the service experience in the future.

To inspire agents to become true customer experience engineers, you have to create a strong level of buy-in. How do you do that? Spend time with your agents to gather their feedback and ask them what you can do to help them provide stellar customer service. Then act on their suggestions. The best centers ask agents for their ideas before implementing a new process or program, and empower them to help create, implement and manage these processes and/or programs.

Now THAT'S how to turn your agents into customer experience engineers. ⓟ

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Common Obstacles to Providing a Superior Customer Experience

Over the last 20 years, we've had the opportunity to work with many call center agents. We've spent a lot of time on the front line listening to calls and collecting agent feedback, and we've conducted focus groups with hundreds of agents in a broad range of call centers. In our work helping organizations to improve their service operations, many of the final solutions come directly from the frontline employees.

Invariably, the managers at each new company we work with will justify certain actions in their call centers by saying: "We're different." But the reality is that their agents all basically provide the same feedback. Remember that it is the individual actions of agents responding to independent service requests that build customer loyalty. Therefore, the frontline agent is in the best position to share what prevents them from being able to focus on providing world-class service.

The following are common themes that we have heard from the frontline staff of almost every company we've worked with:

- Lack of communication — agents are the last ones to know
- Need additional schedule flexibility and daily stability
- Metrics that drive wrong behaviors
- Punishing the masses for the few
- Too much focus on the negative
- Need more management visibility
- Not enough formal training after being hired

What most agents are saying is that they aren't given the tools to be prepared for each moment of truth, and their work environment hinders their ability to pursue ways to fix this. If your agents feel the same way (and experience suggests that they probably do), you'll need to address these concerns before moving things to the next level.

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LEADING THOUGHTS

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Achieving Outsourcing Success

By Tim Montgomery and Floyd Turner

Effective outsourcing begins with in-depth internal analysis. Five tactics for creating a true partnership.

Economic change often drives a company to consider outsourcing, or to increase the amount of work that they already outsource. From a corporate perspective, the call center is a prime outsourcing candidate. Most companies don't consider the call center a core function; many see it as a necessary evil. That the call center is challenging to manage only adds to a company's desire to outsource call center functions.

Starting about 10 years ago, many companies began searching for cheaper offshore alternatives to customer service processes. As with domestic outsourcing, some offshore initiatives succeeded, while others failed. In our consulting work, we've found that, in most cases, outsourcing failure isn't due to geographic location; rather, it's the result of companies not fully understanding and appreciating their customer service processes, and not understanding the direct link between those processes and revenue generation and customer satisfaction.

The outsourcing industry has evolved, and many call center-focused providers are now known for delivering excellent service — sometimes even better service than that provided by the client company's in-house call centers. Call center outsourcers that excel recognize that they have to be "the experts" in contact center operations. They work diligently to ensure that all of their leaders are prepared to perform exceptionally in this challenging environment. Top outsourcers also understand the call center's real value. They know that it goes far beyond merely processing transactions; they must be focused on delighting customers and getting a real ROI out of every interaction.

We're also seeing a change in the relationship that companies have with their outsourcing partners. Today's outsourcing contracts are less about "punishment" for poor performance and more about "reward" for high performance. Also, clients are taking the time to truly understand the dynamic nature of their call center operations and processes prior to handing any business off to a third party. In working with companies on both sides of the outsourcing equation, we've seen that taking the time to establish a proper outsourcing relationship results not only in a harmonious partnership but also in immediate savings to the client organization.

Whether you are looking to outsource for the first time, increase the amount of outsourcing you are doing, or simply want to enhance your current outsourcing initiative, the following are some best practices and tactics for achieving outsourcing success.

Understand Your Real Cost of Turnover

Just about every call center struggles with turnover. Many call centers point to agent attrition as one of the greatest challenges in improving service. Most companies see the value in reducing turnover, but few understand the real *cost* of turnover. It's seldom tracked as part of the P&L, and very few companies

have a model to track all of the specific areas that turnover affects. Turnover is often viewed as another department's responsibility, and any costs are caught up in the typical "budget silo" that prevents companies from getting their arms around a lot of their end-to-end processes.

When considering whether to outsource call center functions, understanding the total cost of turnover and factoring that into the decision process is vital.

What's often missing in turnover conversations is consideration of the lost productivity when a new agent comes up to speed as a member of the call center team. While most managers can appreciate that new agents take longer to handle customer transactions, few managers have the ability to convert this understanding into actual lost productivity and a real dollar impact. The good news is that the data required to get to this number is tracked by your ACD on a daily basis — begin looking at the difference in handle time between new agents and experienced agents. The difference in handle time requires additional staffing to meet the center's service level objectives. In many cases, the lost productivity alone can add $2 or more per hour to the overall cost to serve.

Many studies have been conducted on the total cost of turnover. The standard estimate is that turnover in call centers can amount to one to two times the annual salary of an agent. Using the benchmark of 1x, a $25K a year cost, and a turnover rate of 30%, turnover in a call center with 100 agents will cost the organization about $750,000. Another way to look at it is that the per agent hour cost for a 100-person call center is increased about $4 — just from managing turnover. Knowing this number is vital when comparing in-house and external support to ensure that you're comparing apples to apples.

Focus On Your Organization's "Critical Path"

In every business, there is a critical path to profit and success — the most efficient way for an organization to achieve each of its goals. For example, the most profitable path for an online retailer would be the customer placing the order online, paying online, receiving the exact product when promised and being happy with it. Any deviation from this self-service path (e.g., phone calls to the call center) costs the company more money in support. However, if every one of those phone calls is viewed as a way to help improve

the path for future customers, it's not wasted money. Being able to connect the value of every interaction and its impact on the organization's critical path is key to getting additional support and investments.

> A true partner can't make good on their service commitments unless the company they're working with has taken the time to reflect on their own internal costs, needs, challenges and shortfalls.

When considering outsourcing, you need to ensure that you're not paying for tasks and activities that shouldn't be a regular part of the process — those things that fall outside of the critical path. While there will always be exceptions, having a good understanding of the drivers to the exceptions and their role in the critical path is vital. A first step is to create visual "call roadmaps" for each transaction type and identify the customer support touchpoints that are outside of the normal activity flow. Trying to optimize the entire process prior to outsourcing isn't the goal; you want to identify the activities to keep in-house in order to develop an ongoing process improvement program to move the transactions back on the critical path.

By keeping the more complex portions of the interactions in-house, you'll be able to react much faster to improving the processes that drive unnecessary cost and customer frustration. And, you'll be more satisfied with the activities and objectives of your outsourcing partner.

Be Realistic About Your Own Training and Quality Challenges

Training is a key ingredient to call center success. Just like the work performed in the call center, it is often updated and changed. Before any consideration can be given to creating an outsourcing agreement, an honest "external" assessment of your current training approach and program must be completed. A good starting point is to outline how much of the job knowledge is transferred during the classroom training time compared to what is picked up via on-the-job observations and experience. This step alone will help to identify new ways to approach each training segment, and will move job candidates through programs in the most effective manner. A common result is a realization that training effectiveness has a much longer cycle than the training class as it's understood by the organization. This understand-

ing will allow you to re-evaluate the real "cost" of training and help to identify potential gaps when transferring this function to a third party.

Like training, call center quality programs are often caught in a continuous cycle of enhancement, revisions and updates. Internal quality departments often find themselves at odds with those responsible for executing on the opportunities outlined via observations and scores. Many times, quality challenges are self-inflicted because everyone becomes focused on one thing: the resulting score on the monitoring form. When this happens, quality becomes a number that is an output of an internally designed monitoring form and internally designed point program. The key to success is to get everyone to understand the real value of quality — to improve the agent's behavior, enhance the customer's experience and identify opportunities to improve the entire process. When quality programs are outlined with those results in mind, everyone in the organization is able to align their accountabilities with the outputs from the program.

Outline Your Organization's "Line of Sight"

Success in a call center is often the result of multiple systems and processes that are driven by various departments. A "line of sight" exercise is a good way to help identify all of the functions that have to be inventoried and considered before outsourcing any activities. Once an activity is being processed by another company, the roles and responsibilities in the supporting areas will shift. The initial step is to outline what the activity takes today, and then move to how it's going to be different in the future.

The "line of sight" exercise is a great way to connect the supporting systems to the customer, and it starts with asking the employees who report outside of the call center how they connect their daily activities with activity execution on the front line. When companies go through this exercise, they often uncover several tasks that, if not done, would impact the center's ability to effectively execute. Once complete, these tasks

have to be connected with the functions that will be outsourced to help create ROI scenarios. You can often get the outsourcing partner to take the lead on some of the activities, but without this step, companies are often left with communication and accountability challenges.

The following are just a few of the activities to fully outline, measure and include in your "line of sight" exercise:

- Recruiting, interviewing and hiring

- Training and development

- Quality management, auditing, assessment and improvement

- Knowledge management updates

- Cost and budget analysis

- Forecasting and workforce management

- "Command center" and real-time adherence management

Upon completion of this exercise, everyone in the organization should have a clear understanding of the internal and external process changes that will be required for a successful outsourcing initiative. Don't be surprised to find that your level of effort in some of these areas will actually increase with outsourcing — everything from communication to execution is different when you don't own the end-to-end process.

Appreciate Your Organization's Appetite for Alternative Delivery Methods

Much has been documented regarding an at-home service strategy, and just about every call center organization has had a conversation on the topic. Moving from the traditional brick-and-mortar model is a challenge for most companies as it requires a new level of change and a different way of management. In years past, companies could avoid this decision by pointing to a technology roadblock — high cost, not reliable, lack of security, etc. All of these challenges have been solved, but the biggest obstacle still remains in most service organizations: how to manage agents you can't see. Most of what we've learned and experienced around call center management is focused on the in-person development, training, coaching and disciplining of frontline agents. Anything different is typically approached with some hesitance by seasoned leaders.

Moving work to lower-cost alternatives in different cities or countries is another option that has been considered by most call centers. Just like work at home, this is a change that can make most managers a little uncomfortable, as the obvious end result is the need for fewer leaders in the current location. Many companies have found that moving simple transactions to a lower-cost alternative actually frees up more capital for growth and new initiatives that provide growth opportunities for the existing leadership team. Even with the success stories, any changes to the amount of work that will be processed are often met with skepticism, which prevents companies from focusing on the real value and opportunities that can result.

With work at home and finding lower-cost alternatives, overcoming the negative leadership mindset is often the biggest challenge. Engaging an outsourcing partner can help your organization to get prepared for these changes. Most outsourc-ers now have proven work-at-home models, and experience processing transactions in low-cost areas (both off- and near-shore). Partnering with an outsourcer to test the waters in both areas is an easy way to get the leadership team engaged in the change, and to experience firsthand the lessons learned from companies that have had successes in moving to new delivery methods.

Use Your Findings to Create Partnerships

Without going through the activities outlined above, outsourcing evaluations become very vendor-focused and can result in a development of punishments for non-delivery. By spending time focusing on, and taking ownership of, the internal accountabilities, companies will have a better chance of creating a true partnership. Simply put, a vendor works to sell their services based on what you tell them to do, but a true partner strives to find and execute solutions that go above and beyond what is outlined in the agreement. Vendors simply do what you tell them; they follow a set of processes, handle transactions based on specific guidelines, and execute scripted steps with limited parameters.

In contrast, a partner works with you to develop guidelines and quality standards, providing recommendations, improvements and service enhancements that increase performance while decreasing costs and raising customer satisfaction. Also, a true partner can't make good on their service commitments unless the company they're working with has taken the time to reflect on their own internal costs, needs, challenges and shortfalls. ℗

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ABOUT US

LEADING THOUGHTS

Moving the Call Center
from Good to World Class

By **Tim Montgomery,** Cooney Solutions Group

Raising the service bar for your center starts with an enterprisewide transformation to a customer-focused culture.

What makes a contact center world class and how do I get there? This question is on the minds of more and more call center executives and leaders today because of the successes realized by companies — Amazon, Zappos, USAA and others — that have positioned service as their key differentiator.

These companies operate successfully in low-margin, high-competition industries because they've created loyalty and volume by focusing on a great customer experience. A recent study by the DiJulius Group found that only about 5% of companies fall into the world-class category. The majority provide customer service at average or below-average levels.

Based on how the shift by companies to a focus on customer service, the number of world-class ratings should be much higher, but many companies fall short in the area where the rubber meets the road — the contact center. If a company doesn't get the contact center part of the customer experience right, that company will never be able to move the customer's perception of them to anywhere near world class.

Companies often view service improvement as a project or initiative: something that will happen because they've implemented new processes, technologies or leaders. While these projects often provide positive impacts, their long-term value will be limited unless a core of culture and service — a transformation to world class — becomes part of the organization's DNA. In the contact center, this transformation starts with an understanding of the value provided by the front line, and with leadership making the visible investments required to elevate the visible appreciation of the frontline contribution. World class happens one transaction at a time, and the best organizations provide their frontline agents with the necessary tools, training and respect to enable a great customer experience.

An example of this comes from one of the world's most celebrated and admired contact center-driven service organizations: USAA. More than 20 years ago, they realized that the key to their success was the service provided by the thousands of frontline agents interacting with customers daily. USAA focused their customer-service culture on an appreciation of every single transaction and an investment in the area that facilitated great service — the front line. This commitment was something they would proudly voice to visitors trying to benchmark the operation: "The only thing that can't be copied is our people."

Without an appreciation of the difficulty of transitioning an organization's culture, the journey to world class becomes futile. One way to get everyone in the company to begin to think correctly about that transition is to

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move internal discussions from the notion of service to that of customer experience. To raise the bar, everyone in the organization has to be connected to the ultimate goal. A great experience for the customer through excellent service by the agent is one key ingredient. Great experiences happen when all departments not only have clear accountabilities that connect them to the customer but also work together on ways to continually improve every interaction. Without such a holistic view of the customer experience, the service culture remains silo-focused, giving the customer different levels of satisfaction.

Amazon.com was successful in getting its entire organization connected by focusing on the percent of contacts per transaction. The only way to improve the percentage was for all departments to understand their roles in the experience and work together to improve. With a similar spotlight on the customer from all departments, the culture begins to shift to one focused on the customer, which creates the foundation for world-class service.

As part of the foundation, the leadership team must also be given the tools to do a great job. Just as we invest in the front line with ongoing training and coaching, the investment in the leadership team needs to be as focused and on the same frequency. Many call centers lack an ongoing, leadership-level, development and coaching program. Call center executives often make assumptions that leaders already know how to perform in new ways or that external conferences and seminars are all that is needed. By focusing on frontline agents, we strive for consistency and to ensure that everyone has the right skills to handle a transaction.

This same approach is key to ensuring that leaders have the ability to create and maintain a culture of greatness. Several studies reviewing the impact that happy employees have on customer service and loyalty have reached the same, simple conclusion: Happy employees will always provide a better customer experience. Your frontline leadership team is key to developing a culture that allows employees to do just that.

Break Down the Self-Inflicted Obstacles

Many companies trying to make the leap have had their journey cut short due to self-inflicted barriers that create "reasons" for everyone to prevent the culture from evolving. These reasons quickly find their way through the organization, and the resulting complacency creates an environment so far removed from world-class focus that getting even to above average is celebrated.

The following are some of the common barrier themes we've found in call centers, along with ideas for addressing those barriers and setting a foundation for service excellence:

"WE'RE UNDERSTAFFED"

An easy target is staffing, and many call centers are often caught in the staffing ebb and flow. Proper staffing is the price of admission in a call center. Not getting this part right will negatively impact several of the foundational elements of a world-class environment. Staffing in a call center is math. World-class call centers have programs that allow everyone to understand the math, as well as an agreed-upon staffing plan. Getting the staffing right isn't an option, it's a key component without which world-class isn't within reach.

"CAN'T PAY ENOUGH"

Frontline agents are typically part of the hardest-working and most-productive parts of any company. World-class organizations know that pay is just one piece of the frontline motivation pie. When pay becomes a reason that is voiced, it typically means that the organization isn't able to attract — or retain — enough of the right people. In most cases, the pay isn't the real issue that drives staff away, it's the organization's reputation and culture.

Surprisingly, world-class companies aren't often the highest paying call center employers in their areas, but they realize the lowest turnover and have their pick of qualified candidates. Why? World-class organizations check the pulse of their employees as often as they survey customers. The results become the basis for employee-focused process improvement. Ultimately, the perception — true or not — of the front line must be addressed head-on to maintain and improve the service culture.

"REPS DON'T CARE"

The leadership's attitude toward the front line can become negative when the culture isn't built around great service. Once frontline agents' internal conversations begin to focus on "difficult" customers or complaints about interactions, the customer becomes a roadblock to agent happiness, and those agents begin to feel differently about service and their jobs. When the culture shifts from service to inconvenience, leaders move from coaching for greatness to coaching to overcome complacency.

The best companies find ways to regularly engage the front line for a pulse check on processes, customer attitude and improvement needs. This can be done via a daily huddle focused on learnings from the day before, listening to the reps and taking action. Many organizations provide their frontline agents with tools to provide feedback on details learned from the customer outside of the transaction, which can improve future interactions.

"OTHER DEPARTMENTS"

The reality is that most of the work handled in the contact center isn't created within its four walls. Customers contact a company for a variety of reasons, and the driver is often controlled by marketing, sales, operations, fulfillment or another department. When these areas are not directly connected with the center's daily operations, an "us versus them" attitude ultimately begins to infiltrate every level of the call center. Eventually, the "blame game" works its way outside of the call center, and the conversations with other areas become focused on who caused a situation instead of how it could be handled better next time.

While each department has its own key performance indicators, those outside of the call center often lack a customer focus or connection. World-class organizations find ways to connect every department's measure with a corresponding impact on the customer and the call center. For instance, one approach that is often employed is to develop a contact percent based on an organizational driver. The only way to reduce

the number of contacts per driver is to get every department aligned and force crossdepartmental calibration with the contact center.

"OUR SYSTEMS"

Companies tend to develop systems to meet the evolving demands of their customers. But often, the contact center agent's ability to navigate and provide resolutions is the last step in the process. In many companies, it's easier for the customer to do it themselves online than for the call center agent to process the request using the internal systems.

While obviously it's a good idea to make it easy for the customers to resolve problems themselves, world-class call centers also provide the front line with the tools to deliver on the service promise. Many organizations now separate the call center transactions that are "self-service" candidates from those that require a "knowledge agent". Once separated, the organization is then able to provide the front line with a different toolset to make it easier for them to provide resolution and educate customers on ways to resolve problems themselves in the future.

"SENIOR MANAGEMENT JUST DOESN'T GET IT."

This is a comment that we've heard time and again from call center leaders who are struggling to gain support for their initiatives. The key to success is to ensure that your initiatives are broken down into targeted, digestible chunks.

We've worked with many very smart people who, for one reason or another, have adopted a "keeping your head above water" approach to call center management. Many senior executives with call center responsibilities have never run a call center. In fact, 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 much easier to transform their opinions, and that transformation begins by making sure that all of the frontline leaders have a strong understanding of what it takes to run an effective and efficient contact center.

Driving a World-Class Contact Center Mindset

Some shared practices can be found across contact centers that are known for providing a world-class experience. What they do differently isn't rocket science or something that other companies haven't tried to do. The difference between successful implementation and failure comes down to the universal understanding that, if they don't get the foundational processes right every interval of every day, the customer will get caught in the middle.

The following are some basic practices employed by world-class contact centers that help to drive a culture focused on creating great customer experiences.

HIRE NICE AND RIGHT

When Nordstrom's founder was asked who trained his employees to provide great service, he responded, "Their parents." Great customer service organizations know that finding candidates with a great attitude is more important than technical skills or experience.
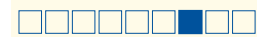
World-class contact centers employ agents who have the ability to create an emotional connection with their customers. Zappos received a lot of media attention for offering new employees $2,000 to quit during the initial training program. This type of people "guarantee" requires everyone in the organization to be aligned with the goal of hiring right the first time. This approach has been successful in creating a great service environment, as well as helping to control one of the contact center's greatest expenses: turnover.

CONTROL PUNISHMENT

Contact center management involves so many numbers and metrics, many managers get caught up in concentrating on the "mechanics" of the center. The trend to convert metrics into scorecards, reports and coaching opportunities seems like a good idea on the surface, but if poorly implemented, it will impede agents' success. What is more important than the numbers is the way we use them, and the best contact centers focus more on the positive, especially with the great performers.
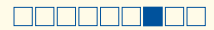
POLICIES = NO

As contact centers grow and evolve, so do the policies and procedures — in other words, what we "allow" frontline reps to do for customers, and what they "can't" do for customers. But when policies are left to manage the process and frontline agents, the customer gets caught in the

middle and is often told "no" or made to wait on hold for approval.

Leading customer service organizations understand the impact that empowerment has on the customer experience. They provide their agents with the ability to make decisions without fear of being reprimanded for breaking the rules. Armed with decision guidelines (e.g., refunds up to $300), agents can quickly resolve frustrated customers' issues — turning a challenge into a great experience that will keep customers loyal. This type of flexibility also increases internal capacity since, in most cases, customers get what they want without having to wait for approval and with fewer people needed to overturn the policy.

THANK YOU

The two most powerful words that can transform the organization's culture. The contact center has to evolve its environment from one that focuses on punishment to one in which positive behavior is rewarded. It starts with recognizing agents for doing a great job — not with pizza or trinkets, but with personal appreciation for the great things that agents do every day. Walk into a world-class organization, and you'll see many types of acknowledgement displayed throughout the center, such as handwritten notes, impromptu coaching sessions, pictures and plaques. These are just a few of the more effective ways for leaders to praise their agents. Public recognition focused on thanks creates internal pride in frontline agents

that quickly finds its way into the customer interactions.

LINE OF SIGHT

The line of sight shouldn't end with the ACD reports. World-class contact centers understand and appreciate the role that every department plays in delivering a great customer experience. The best call centers are connected to every department on a real-time basis, providing feedback in both directions to ensure that service promises are realized on every transaction. The centers that have made this leap have developed and have driven a customer-first communication protocol throughout the organization. In these companies, finger-pointing has been replaced with ongoing service improvement conversations.

World-Class Frontline Agent Mindset

A customer-focused culture is a key enabler to raising the service bar. To ensure that it evolves, developing and maintaining the agents'"customer attitude" is essential. Once the organization has built a solid foundation, a positive connection with the front line will help to reinforce their ability to create an emotional connection with their customers. In working with world-class organizations, we've found common themes in the feedback from the front line, including:

I OWN IT

Frontline agents take ownership for their customers' issues. They feel that it's their responsibility to ensure that the customer receives a quick and accurate resolution to their problems. Customers aren't viewed as transactions or calls — frontline agents know that their job is not only to solve the reason for the customer's contact, but to look for other ways to create loyalty.

BEYOND THE CALL

Many centers have developed formal training programs related to job tasks based on the skills assigned. The best contact centers take this a step further and train their frontline agents to think beyond the call, and give them the tools to get a return on investment from the transaction. The agents understand that every contact with a customer is an opportunity to gain valuable feedback for future customers and the company. And they're rewarded and recognized for the improvements they provide.

I AM "US"

The contact center is the face of the organization and often the only department or system that customers "see." In world-class organizations, the frontline agent's attitude reflects this realization. Agents see themselves as customer advocates and work to ensure that customers are armed with the right expectations and steps necessary after the call.

I KNOW THEM

The idea of "walking in the customer's shoes" is a training tool employed by many centers. In most cases, though, it's just a classroom exercise vs. actually spending time experiencing the company's products and services from the customers' point of view.

Providing your agents with access to the services they support is a great first step in developing their customer-focused insights. When frontline agent are an active users of your products or services, not only will the customer's experience improve, you'll have an internal process-improvement team that will benefit the entire organization.

It Doesn't Happen Overnight

All of the themes and practices that we've outlined require a transition — and most organizations will need to start (and stop) established procedures and policies to begin to evolve from good to world class. Many of these recommendations involve coordination across the enterprise and, thus, may become individual long-term projects and initiatives. But taking a piecemeal approach to world-class service will only create frustration and a lack of faith in the overall effort.

Companies that have been successful in making the leap understand that tackling just one thing at a time doesn't cut it. To ensure success with your world-class evolution, start with a complete inventory of your customer experience opportunities, and develop a strategy to get all departments to shift from traditional KPIs to success measures that are connected to the customer.

Every part of the organization plays a role in service success, and getting all departments to see (and report) their service impact is a critical step in creating the world-class service foundation. Once the service culture is in place, other improvements can follow, but without the right culture, everything will be an uphill battle. ⓟ

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ABOUT US

LEADING THOUGHTS

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Coaching Frontline Leaders

The most critical success factor in agent performance is ongoing coaching for the supervisors who provide the frontline coaching.

The ability to provide world-class contact center service is directly linked to employees with the right attitude, skills and motivation to deliver during every moment-of-truth interaction. Many companies have developed formal coaching programs targeted at arming frontline agents with the right information and processes to provide service that meets the customer and company requirements. While these programs can improve customer interactions, they often become more routine than effective, resulting in a task to be completed versus an activity that everyone looks forward to.

The short-lived success of most agent coaching programs generally can be blamed on the lack of investment in the frontline supervisors who provide the coaching. The reality is that everyone can use a coach, and in the challenging, labor-intensive call center environment, frontline supervisors need to have just as many, if not more, interactions to help them improve themselves and others.

During our visits with various contact centers, the word "coaching" is often used in conversations with management. However, it isn't always clear what coaching actually means. The word "coach" is based on the French word "coche," which describes a vehicle to transport people from one place to another. Within the context of training frontline supervisors, effective coaching brings to light obstacles that prevent managers from taking their employees to world-class

service delivery standards on every customer interaction. It's all about helping frontline supervisors to identify these barriers, finding creative ways to break through them, and then holding them accountable for doing so. In this respect, the leadership coach is in a partnership with the frontline supervisor/coachee and becomes a catalyst for improved results.

According to Vince Lombardi, the most successful football coach of all time, "Coaching fosters a winning attitude by engendering a 'vision from the bottom up,' motivating constructively and building accountability and resiliency within the team."

Lombardi's view of coaching is simple, straightforward and gets at the heart of the value of coaching supervisors. No matter what type of contact center environment you have, there is a team. It may be well defined, as with a small group handling a specific product, or it may be comprised of hundreds of individuals all answering a variety of questions. The reality of a pooled service environment is that the workload (customer inquiries) is shared among a group of people, a team. Because individual activities do and will impact everyone else on the team, it is important to get all of your supervisors on the same page. That starts with ensuring that they're involved in the coaching program and are ready to help drive the vision from the bottom up.

Similar to coaching frontline staff, a supervisor coaching program must be approached with discipline and

Four "Musts" for a Leadership Coaching Program

Must be collaborative

Must be balanced

Must be encouraging

Must be practiced

an appreciation for the value that it brings to your supervisors and company. As with frontline coaching, you must make the time to prepare for coaching, set aside time for regularly scheduled sessions, and track your supervisors' progress toward their coaching goals — and, ultimately, to their team's desired performance. Keep in mind that, when coaching supervisors, the main emphasis should not be on tracking personal performance — it is getting them to focus on actions to achieve goals that drive the team's performance. Typically, there are two barriers to doing this: time and skill.

It Starts with an Investment Commitment

Whether you are an experienced coach looking for ways to improve supervisor development, or are in the beginning stages of establishing a formal program, be honest with yourself, your company and your supervisors with regard to the amount of time you'll need to dedicate to coaching. If you have five direct supervisors reporting to you, and you're spending less than five hours a week on one-on-one coaching with your team, then you're not investing the time needed to provide real returns for your organization. Remember that coaching time is *in addition to* the other time you spend with supervisors in staff meetings, etc.

We often hear contact center leaders say that they can't dedicate five hours every week to coaching. Some of their excuses are very creative, but in many cases, the reason they can't spend time

coaching is simply because they haven't become accustomed to doing so and probably don't see the value of it. If Lombardi had not pledged his time to helping each one of his players improve their contribution to the team, he wouldn't have been successful. When you're not successful, you end up spending a lot more time explaining why you're not successful, instead of spending it on the activity that makes you successful — growing your frontline leaders through coaching.

In the real-time contact center world, when the results aren't there, we spend a lot of time trying to fix the metrics at the expense of spending time with our supervisors. Thus begins a cycle that is hard to break. Getting the buy-in from senior management for a coaching program, and the time that is needed, is no simple task. It starts within your own leadership team and getting your peers on board. Spend some time discussing different approaches to coaching, the benefits of spending more time with frontline supervisors, the potential return on the time investment, the impact on the enterprise's bottom line, and the changes needed to make more time for coaching.

You'll most likely find that just about every member of your leadership team could make time for coaching if they had fewer administrative activities. You'll also find that, if these activities were "pooled" (similar to the what you do with the inbound contact center workload), tremendous efficiencies could be gained. Next, turn your attention to the other results, and document all of the wins for the company by moving the

administrative tasks from leaders and providing them with time to develop their teams.

Don't Assume Leaders Know How to Coach Leaders

From there, you'll need to determine how to formally implement the program in your organization. Too often, programs are implemented without spending the time to train the coaches. You can't assume that everyone on your staff has the natural ability to coach other leaders effectively. Even your most successful managers can use a "tune-up" from time to time.

Since coaching is really a communication process that connects people to performance, two key areas of focus should be on the **quality of the relationship** between the leadership coach and the coachee, and the **ability to guide and influence behaviors that drive performance**.

Critical to the coaching relationship is establishing rapport. Since a relationship already exists between the leadership coach and the frontline supervisor, the nuances of an effective "coaching" relationship are:

- Approachability and being fully present
- Trust and a safe environment, recognizing that communication may involve personal risk
- Openness in sharing thoughts, perceptions, and expectations in a way that demonstrates positive intentions behind the candor

Since the desired outcome of any coaching program is to drive performance, the emphasis should be on the skills that guide and influence behaviors that drive performance. Among the most critical are:

- Reflective listening — for what is said, not said, meant to be said, implied or physically said.
- Acknowledging and validating — letting coachees know that they have been heard and confirming that their thoughts, feelings, and perspectives are valid.
- Probing, challenging, and reframing through powerful questioning — being curious by asking open-ended, thought-provoking questions to get coachees to look beyond the obvious and to find fresh

11 Powerful "What" Coaching Questions

- What are you trying to accomplish?
- What's working well?
- What's getting in the way?
- What results have you achieved so far?
- What's your role in the problem/solution?
- What choices do you have?
- What is next thing you will do?
- What's your plan of attack?
- What resources do you have at your disposal?
- What did you do the last time you experienced this?
- What support do you need from me?

perspectives to their thinking.

- Squashing limiting beliefs — identifying and challenging beliefs and assumptions that negatively impact the leader's ability to produce desired results.

- Providing effective and balanced feedback — sharing candid observations and insights with empathy and respect and without judgment.

- Promoting choice — guiding coachees through the identification of myriad choices in their attitudes and actions.

- Forwarding action — placing the emphasis on solutions as opposed to problems, and facilitating the movement from where coachees are to where they would like to be.

- Goal setting and accountability — translating desired action to goals, establishing commitment to goal achievement, and holding coachees accountable to commitments.

While these skills are particularly effective in the leadership coaching, there is also obvious applicability when coaching frontline agents. If the skills are modeled well by the supervisor's coach, the supervisor will then transfer the knowledge and skills to his or her frontline team, resulting in improved service delivery to the customer.

Launching a Leadership Coaching Program

The real implementation starts with all leaders understanding that good coaching is about getting others to want to change the behaviors that are impeding success. A leadership coach doesn't have to be a subject-matter expert in the specific job task — the focus is on the leadership behaviors, and not the task. Appreciating this distinction is key to successfully coaching leaders. Coaching leaders is not about telling the individual how to do something; it's about helping them to figure out for themselves the best way to improve performance. A good way to help your leadership coaches understand their role is to emphasize comparisons between traditional management and coaching, for instance:

- A boss pushes, a coach supports.
- A boss tells, a coach listens.
- A boss knows the answer, a coach facilitates the answer.

Coaching is most effective when there is two-way buy-in to the communication process. This also holds true when developing a formal program. Getting the key people involved in the program's development and execution will help to gain the internal buy-in and raise the education level of everyone involved.

There are several programs, training manuals and guides for implementing coaching programs on the market. Some are better than others, but most can be helpful in defining the foundation on which to build your program. Because effective leadership coaching in a contact center has a direct impact on the overall service provided, the implementation of a new leadership coaching program should be given the same attention and focus as a new technology implementation — if not more.

Lombardi's view on coaching began with a simple principle — foster a winning attitude. Each of his players looked to him every day for the inspiration to maintain that attitude. No matter what type of program you develop, its success depends upon the coaches — how they carry themselves and the attitude that they project each and every day.

Everyone in a leadership role needs to understand that, even when you're not directly interacting with your direct reports, you are coaching through your actions, attitudes and gestures. Your behavior determines how effective you'll be when it comes time to provide the direct feedback that will inspire your teams. To be a good coach, you have to walk the talk: If everyone doesn't buy into this concept, the best program in the world will fail because the "vision from the bottom up" will become blurred.

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