

Tim has honed his expertise by working closely with and advising some of the world's most recognized service organizations

The Coca-Cola Company

 USAA

 DELL

 AMERIGROUP
CORPORATION

Lifetouch

 MITSUBISHI
MOTORS

 AIG

 The SCOOTER Store™



Prudential

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BLUE CROSS
An Independent Licensee of the Blue Cross Blue Shield Association

 PRIME
THERAPEUTICS®

Bridging the Gap to WORLD CLASS CUSTOMER SERVICE



CSG COONEY
SOLUTIONS GROUP

Some of Our Experts



■ **Beverley McClure**

- Former Operations SVP at USAA and Change Management Expert

■ **Michael J. Krahe, Ph.D.**

- Former Strategy EVP at Erie Insurance and HR Expert

■ **Tim Handren**

- Former COO at USAA and Service Operations Expert

■ **Scott Kaeppele**

- Former VP at WellPoint and Process Engineering Expert

■ **Luther Branham**

- Former Operations SVP at USAA Bank and Finance Expert

■ **Jeff Austin, Ph.D.**

- Former HR SVP at The Scooter Store and Leadership Expert

■ **Jeff Lewis**

- Former SVP at Allstate and Customer Experience Expert

**"World Class is NOT
something you
deliver, it is a RESULT
of something you are"**

John DiJulius



The 7 Biggest Challenges

- 
1. Agent Incentives
 2. Coaching
 3. Outbound Integration
 4. Right Metrics
 5. Size and Productivity
 6. Value to Others
 7. Agent Turnover



**Jeff Bezos, Amazon's CEO:
“Be afraid of customers...”**



The Old Way

1. Service Culture
2. Policies/Procedures
3. Promote Yourself



The nOw Way

1. Service Culture
2. “Real-Time” Process
3. Customers Own You



Big Mac

Dumb happens.





“This is a wonderful place to work – feel proud to be an employee”

“My focus is making the customer I’m talking with happy”

“I’m part of improving customer service every day”

A woman with short brown hair, wearing a white lab coat, is holding a clear glass flask in one hand and a test tube in the other. She has a surprised or shocked expression on her face. A large, semi-transparent blue cloud surrounds her from the waist up.

Talk Time

FCR

Bathroom Time

Adherence

Attitude

Sick

Hold Time

Recommendations

Wrap Time

Accuracy

**THE WORLD'S GREATEST
CALL CENTER
SUPERVISOR**

Quality

Scores don't change behaviors

Trends indicate opportunities

**Goal is to improve service not
manage agents**



**THE WORLD'S GREATEST
CALL CENTER
SUPERVISOR**

Productivity/Adherence

Without the reality, the planning process is flawed

Indicators of opportunities to coach new behaviors

Fluid – changes with the processes

**Agent
Empowerment
Limited by the
Numbers**

**Outline the
Behaviors First,
Then the Drivers**

**Moving
Metrics**

**Into
Action**



**It's okay to focus on
what's in the box!**



CAUTION

**Outliers from the Norm
Personal Best
Behaviors from Metrics
Coaching beyond QA
...Buy-In and Easy**

Talk Time
Quality
Adherence



**“Ninety percent of what we call
‘management’ consists of
making it difficult for people to
get things done.”**

– Peter Drucker

Comparing Apples
to Watermelons
and the resulting
AVERAGE

**Give leaders the
tools to COACH
the solution**

Moving
Metrics

Into
Action

**20
Minute
AHT**

- 7 Hours of Phone Time
- Caught on 3 Long Calls a Day (5 mins)
- 30 Minutes of Other Non-Adherence Time per Day

79%

**5
Minute
AHT**

- 7 Hours of Phone Time
- Caught on 3 Long Calls a Day (20 mins)
- 30 Minutes of Other Non-Adherence Time per Day

89%

A large Southwest Airlines airplane, featuring the iconic red, yellow, and blue stripes, is parked on an airport tarmac. In the foreground, several luggage carts are visible, some with Southwest branding. The sky is clear and blue.

Herb Kelleher On Coaching...

You don't have time to do anything else until you accomplish that; focus all of your time and then the rest of it will fall into place and be easy.

WHAM!





9500 Fredericksburg Road
San Antonio, Texas 78288

TIMOTHY JOHN MONTGOMERY
18713 BROOKWOOD FRST
SAN ANTONIO, TX 78258-4443

||||||||||||||||||||||||||||||||||

Dear Mr. Montgomery:

Thank you for using USAA's First Mortgage Program. Please take a few moments to let us know about your experience with this program by answering the questions below. When answering these questions, please focus on the mortgage service you have received after you closed on your mortgage.

Thank you for your time and feedback.

Since closing on your USAA mortgage loan, how would you rate the overall service you receive?

Poor Acceptable Good Very Good Excellent

Please tell us what we could have done better.

Please tell us what we did well.

Please return this survey in the enclosed postage-paid envelope. Please do not use the enclosed envelope to conduct other USAA business.

E0788-070

YOUR FEEDBACK IS IMPORTANT TO US.

■ PLEASE TAKE A MOMENT TO COMPLETE
THE SURVEY BELOW.

Well Hear Alter Modify

A black and white photograph of a man from the chest up. He is wearing a dark suit jacket over a light-colored shirt and a patterned tie. He is looking down at a smartphone held in his hands. His expression is neutral to slightly weary. The background is blurred.

**90% OF MANAGERS
THINK THEY'RE AMONG
THE TOP 10% OF
PERFORMERS
IN THEIR WORKPLACE**

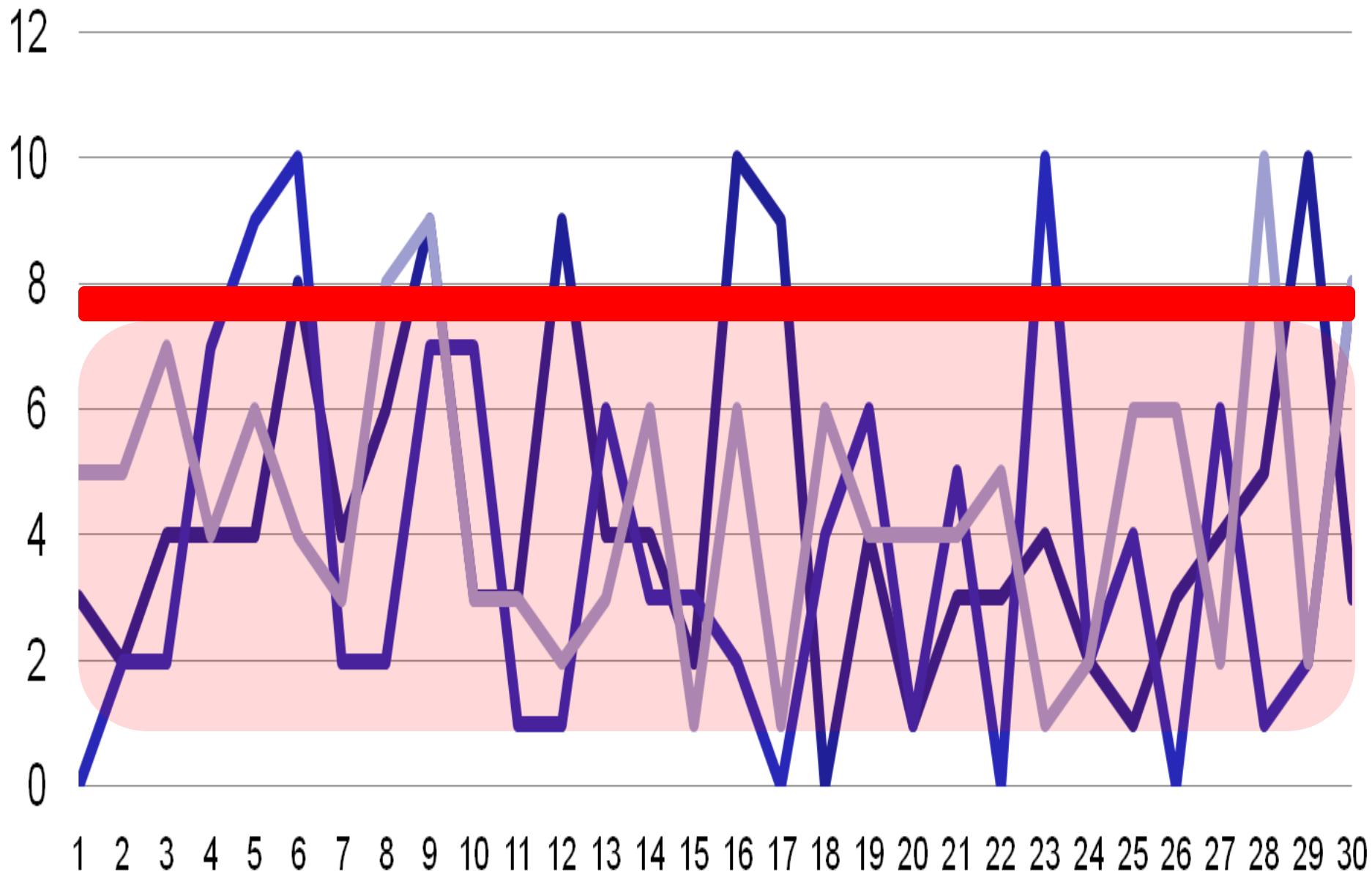
? Can you be available for
Inbound when on an Outbound



STOP

**MURKAMER
TIME!**

@ a 6 minute handle time we'd staff 35 people to meet an 85/30 SL for the three examples.





Service Level/ASA

Is the door open when promised?

How much of my time are you willing to take?

Should I begin to look for an alternative?



Abandon/Answer Rate

I'm too busy right now

I don't have tolerance for wasting time

I have alternatives

Too Much Time
Spent Analyzing
the Score

More Time On the
Game Film and
Moving Players

Moving
Metrics

Into
Action



CAUTION

What is Planned?

What do I Have?

What is Down the Road?

**...Adjust Based on Future
NOT Past**

Svc Level
ASA
Abandon
Adherence

	7:30am	8:00am	8:30am	9:00am	9:30am	10:00am	10:30am	11:00am	11:30am	12:00pm	12:30pm	1:00pm
Monday												
Service Level	94%	100%	99%	81%	51%	96%	99%	97%	97%	97%	37%	17%
Avg Speed of Ans	10	2	4	12	36	12	3	4	4	6	50	81
Answer Rate	98%	99%	99%	97%	97%	99%	98%	99%	100%	99%	92%	93%
Abandon Rate	2%	1%	1%	3%	3%	1%	1%	1%	0%	1%	7%	7%
Call Forecast Var	8%	-9%	-11%	-7%	-4%	-9%	-7%	-8%	-5%	-3%	0%	11%
AHT Forecast Var	-2%	14%	10%	10%	3%	13%	8%	10%	3%	-3%	12%	15%
Adherence Var	90%	92%	88%	83%	80%	97%	89%	88%	83%	90%	90%	90%

Service Level Goal - 85% in 30 Seconds

Avg Speed of Ans Indicator - More than 20 Seconds

Answer Rate Indicator - Less than 95%

Abandon Rate Indicator - More than 2%

Call Forecast Var Goal - Not Greater than 10%

AHT Forecast Var - Not Greater than 10%

Agent Adherence Indicator 85%

82% of the intervals within the service level objective

86% of the intervals within the ASA objective

89% of the intervals within the answer rate objective

82% of the intervals within the abandon rate objective

79% of the intervals within the call forecast objective

50% of the intervals within the AHT forecast objective

90% of the intervals within the agent adherence objective

**Measures Put In
Place Because
Everyone Else
Does It**

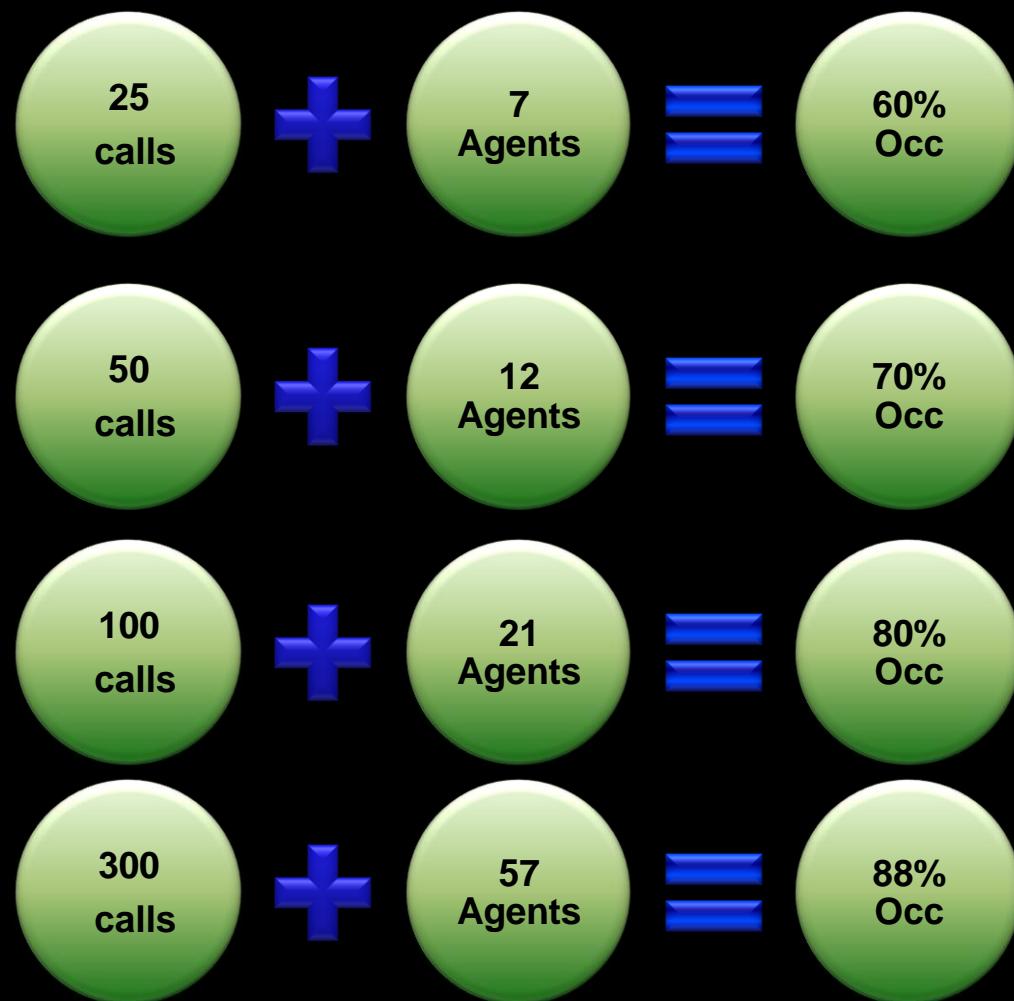
**Understand That
Size Makes Call
Centers Different**

**Moving
Metrics**

**Into
Action**

80/20 SLO

- 250 Second Talk Time
- 50 Second ACW



Service Level % 90

Answered in: 30 secs.

Staffing Req	Volume	AHT (secs)	ASA (secs)	Occupancy Rate
119	575	340	7.8	91%
65	300	340	8.2	87%
45	200	340	8.6	84%
18	70	340	11.1	73%
8	25	340	13.4	59%

A black and white photograph showing silhouettes of several business people in a meeting. One man on the left is gesturing while speaking. In the center, two men are engaged in conversation, with one pointing his finger. To the right, another man is gesturing with both hands. The background is plain white.

Senior
Management Just
Doesn't Get It...



A Million Bucks

10,000







Gallup – Why Employees Leave?

Lack of **MANAGEMENT** support in areas such as performance and development.

No faith in **LEADERSHIP** or vision of the company.

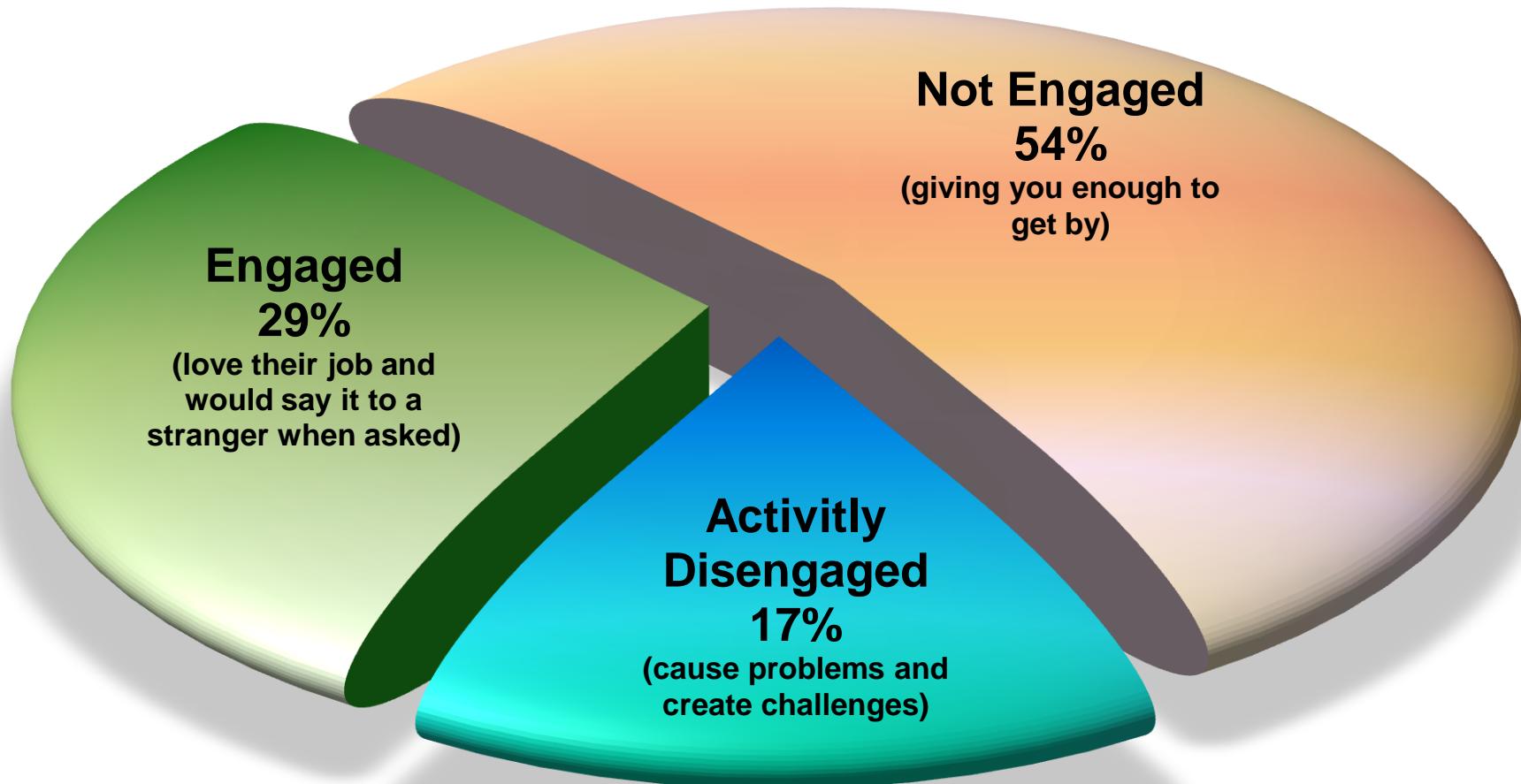
Concern with **MANAGEMENT's** treating of people.



“I do what is required of me – nothing more”

“This is a temporary position for me - just buying my time”

“The managers just don’t get it – we see what’s really happening everyday”



A woman with red hair tied back in a bun, wearing a light blue and white horizontally striped t-shirt, is captured in mid-motion, throwing several pieces of paper or documents upwards. The background is a plain, light color.

Build incentives around the things agents can control and set “fluid” targets

1

Formalize coaching and create a coach the coach program

2

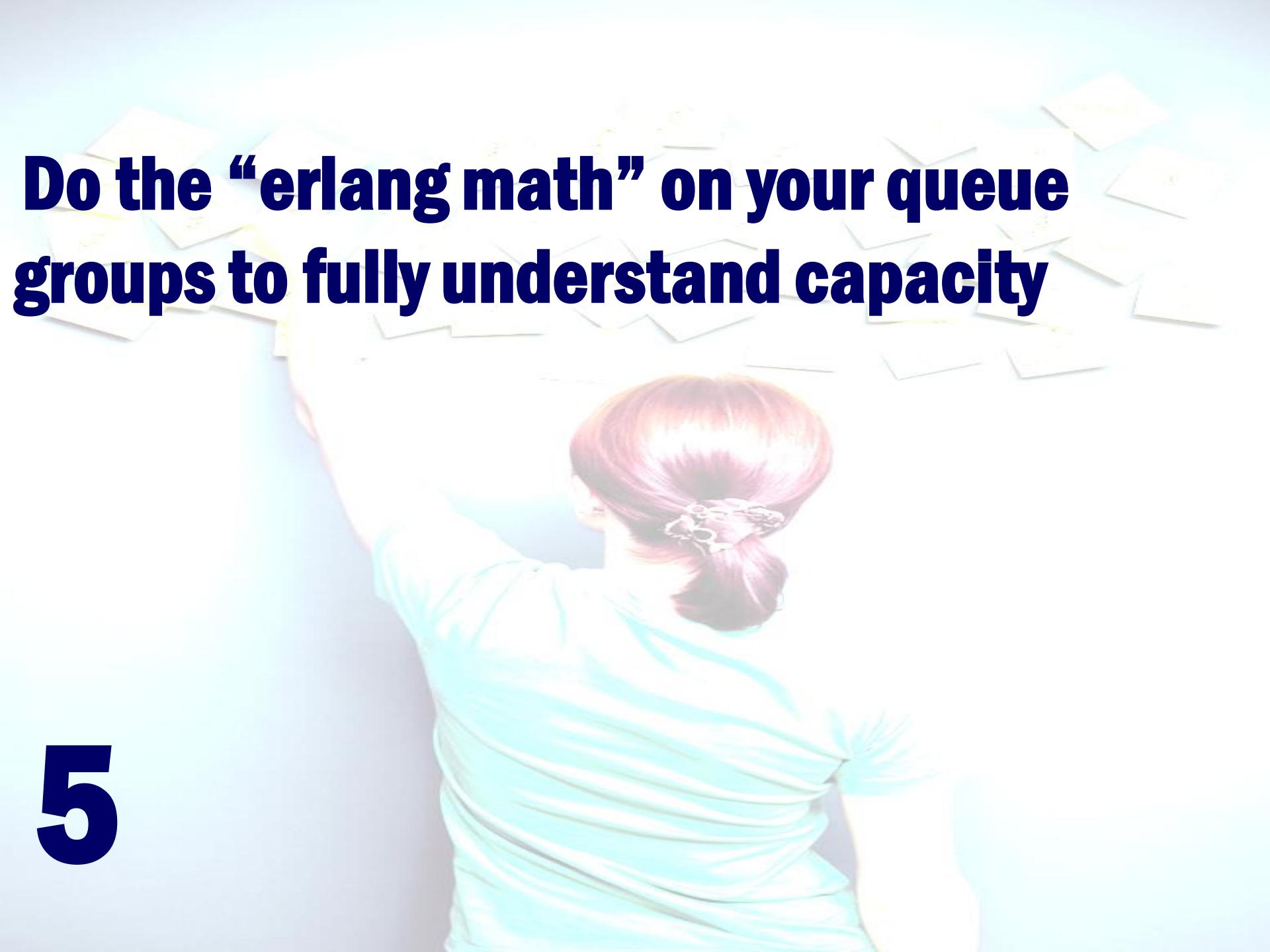
**With Inbound SLOs, you MUST track and
eliminate things that take agents away**

3



**Adjust the centers performance metrics
to highlight the interval**

4

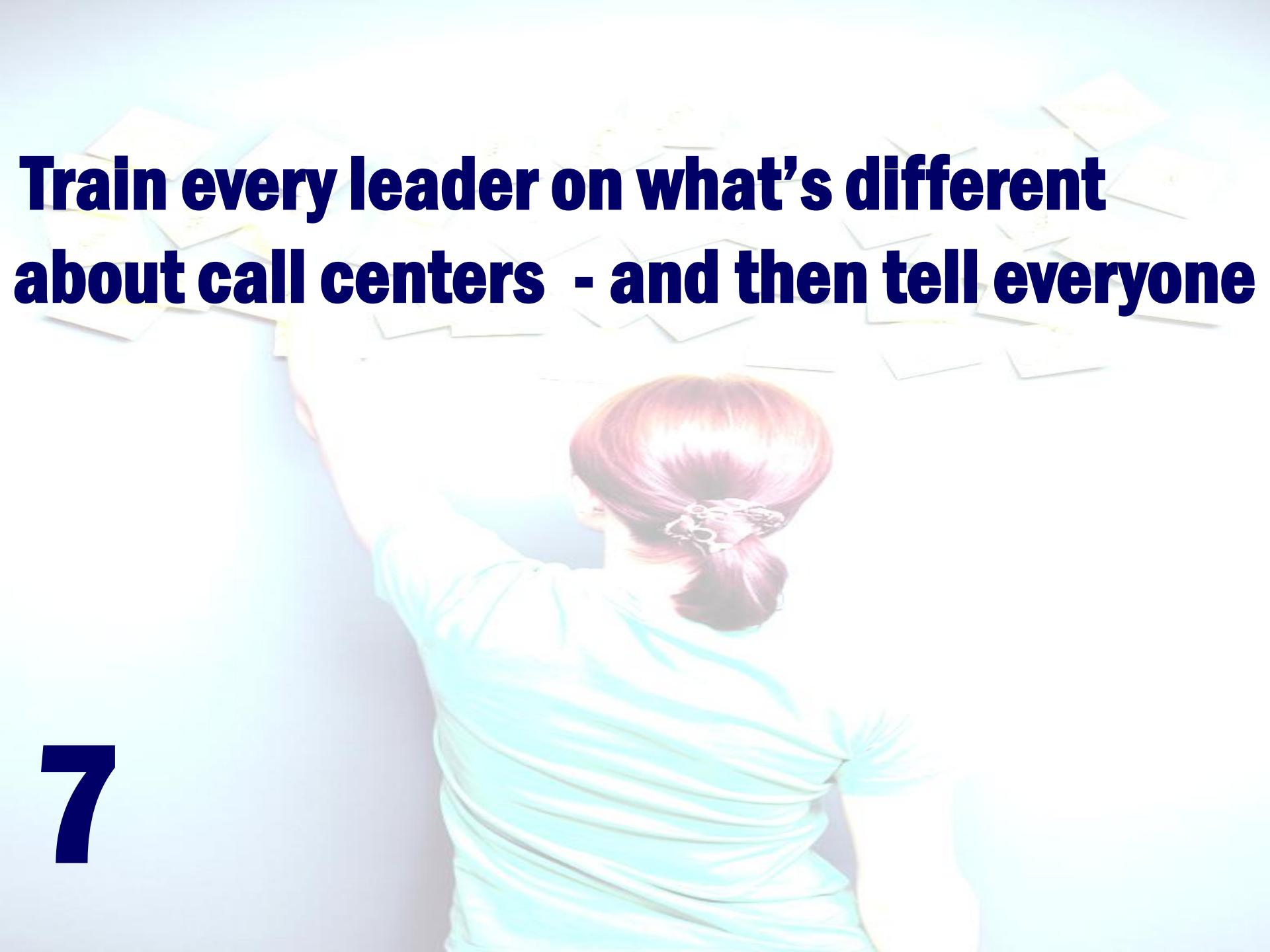


Do the “erlang math” on your queue groups to fully understand capacity

5

**Listen to calls from a different perspective
– add 2 questions focused on value and
avoidance**

6

A woman with red hair tied back in a bun, wearing a light blue and white horizontally striped shirt, is looking down at a large pile of papers or documents scattered across a surface. The background is a soft-focus view of more papers.

Train every leader on what's different about call centers - and then tell everyone

7

**You Can't lose 20
pounds in a day**



TO DO:

Get slides and articles
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