

# Jacada White Paper

## From Transactions to Interactions: 25 Workforce Strategies to Support Extraordinary Customer Experiences

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The drive to provide great customer service is nothing new. Organizations have been striving to improve customer service for years. However, the drive for outstanding service has taken on a whole new urgency in this decade as customer service stories – both good and bad – go viral. One customer’s heartwarming story about “above and beyond” service can provide the kind of marketing that money can’t buy when that customer decides to post it on Facebook or tweet about it to hundreds of friends and associates. Likewise, one service stumble can cause immeasurable damage as word spreads at Internet speed.

It’s no wonder that organizations are busy plotting social media strategies to maximize good exposure and minimize damages when a bad story surfaces. However, many organizations are missing an important part of the strategy. They are focusing on the ramifications of the story after the fact, rather than devoting effort up front to creating great customer experiences in the first place.

Efforts devoted to creating outstanding customer interactions have tremendous payback. The first and most obvious benefit of these memorable experiences is customer satisfaction, loyalty, and retention. It’s been said it costs four times more to obtain a new customer than to keep an existing one, so focusing on satisfaction and retention strategies have immense payoff. And of course, the other reason to focus on improving customer interactions is today’s immediate public relations opportunities (or threats).

As someone who does call center training and consulting for a living, I’m always on the lookout for service success stories. For me, most service experiences fall into the middle of the bell curve, where the interaction was satisfactory, but not exactly worthy of a tweet or a blog mention. However, I’ve had a few “wow” experiences recently where I was really blown away by the service I received from a single individual. A few of these were memorable, loyalty-generating experiences that not only solidified my relationship with the company, but become customer service stories I tell to hundreds of people at a time.

When I do have a great service experience, I often question what contributed to the make-up and training of that individual that made him or her decide to go that extra mile for the customer, because the majority of customer service reps decide not to go down that path. There was a recent study called the Report on Restoring America’s Competitive Vitality that showed 44% of employees do what is required, but exert no extra effort. Only 23% reported that they performed to their full potential. So how do we get that 23% number higher and have more employees willing to give not just good, but fabulous service?

In this paper, we’re going to explore five important components of getting employees to give that “wow” brand of customer service:

1. Hire the right people for the job.



2. Train staff for the “interaction” as well as the “transaction” part of the customer contact.
3. Coach regularly to fine-tune performance and reinforce desired behaviors.
4. Develop individualized motivation programs that encourage each employee to excel.
5. Assemble a system of quantitative and qualitative measures to ensure you’re getting the behaviors you want.

This paper outlines five specific strategies for each of these five areas – a total of 25 ideas that contribute to building a workforce that is ready to go above and beyond.

## MAKING THE MATCH: HIRING THE RIGHT STAFF

If you’re been searching for one single thing you can do to improve training success, staff retention, call quality, and overall performance of your staff, there is a single solution that will significantly improve all these other areas. Simply make the right hiring decisions on the front end and everything else is impacted in a positive way.

Here are five strategies associated with hiring the right staff to maximize customer interactions:

1. Define all components of the job.

It’s important to outline all the roles, responsibilities, and job tasks associated with the open positions. Be careful that you don’t just copy a generic job description and use this to guide your search. Nobody likes writing job descriptions, but it’s worth some effort to think through the job tasks and work breakdown to realistically describe the job to others.

In addition to job tasks, you’ll want to outline the competencies required for the job, either at the point of hiring or within a certain period after training and job experience. Note that some of these competencies will be more about personality characteristics and less about specific knowledge and skills in a certain area. For example, sitting in one’s seat for extended periods of time and doing routine, repetitive tasks describes one aspect of the job and suggests a certain personality type that is suited for this kind of work.

2. Cast a big net to maximize your applicant pool.

One of the keys to successful hiring starts with maximizing your applicant pool. You want as many qualified and interested people as possible from which to choose as you build your call center workforce. For many companies, the starting pool is way too small and in order to fill seats, positions are filled with less than ideal candidates.

Increasing the applicant pool begins with how call center positions are advertised. Many centers are still relying on traditional classified ads in the newspaper and/or online to list the position and attract job prospects. The problem with this approach is that most people that have a job already aren’t searching these job listings. Only the unemployed or those unhappy with current work are going to see these listings and let’s face it -- availability is not a skill set.

You’ll want to cast a bigger net when fishing for call center job prospects. Advertise the position where a broader base of people will learn about the opening, even if it means spending a bit more money on radio or television ads. You might advertise the position on signs on your building, on local billboards, or via flyers at local events. Just getting the word out in the local area near your center can attract candidates that are nearby and interested in learning more about the position.



### 3. Create a comprehensive employee referral program.

One of the most effective means of advertising for new staff is to have your existing staff serve as recruiters for you. There's nobody that knows the job any better and they can be effective at finding friends and family members that they think will also be a fit. They're not likely to bring in people they know would be unhappy in the job or might embarrass them later with poor job performance.

It's important to provide enough incentive for existing staff to encourage them to bring in new people. You'll want to have clear hiring protocols in place so it's clear why someone did not get hired and you should communicate this clearly to candidates that didn't make the cut so there are no hard feelings with your recommending employees. Call centers that utilize this methodology pay a "finders fee" typically once the hiring has proven to be a success – usually after 60 or 90 successful days on the job.

### 4. Test for personality more than knowledge or skills.

Another big factor in hiring success is the screening for personality characteristics that are a fit for your type of call center work. While many centers focus on skill testing, time and money is perhaps better spent on psychometric testing. If people have the right personality for the job, you can teach them most of the needed skills, but you can't teach or shape someone's personality to be a fit for your center's culture.

This psychometric testing can help you assess important characteristics that predict job success in various areas. For example, there are certainly personality aspects that are highly correlated with sales aptitude or success in being able to provide support and trouble-shooting in a highly technical environment. Not only does this type of testing show a range of personality characteristics that will predict performance in a specific area, but will also predict how well the candidate will actually like the job and find fulfillment in doing it.

While behavior-based interview questions can get at some of these traits and characteristics, the interview process is simply not as reliable. Some managers and supervisors are not effective interviewers. Likewise, there are many candidates that are good at the interview process but not well-suited to the job. Interviews alone can result in a poor hiring match and the process is substantially improved by a more scientific testing process.

### 5. Have a realistic expectation exchange before hiring.

Finally, once you've decided which candidates you would like to hire, it pays to have a realistic expectation exchange with them before you both agree to move forward. Many of these expectations should be communicated early in the screening process so that candidates can remove themselves early in the process when they hear and see the true nature of the job.

A full expectation exchange at the time of the job offer should outline all the job requirements and performance expectations. You'll want to provide information about the candidate's likely work schedule and how long it might take to get a better one. Outline all attendance and schedule adherence expectations and the consequences for not meeting them. Let them know what will be measured in terms of schedule adherence, quality scores, efficiency and productivity measures, etc. and how this information will be used in evaluating their performance. There are some candidates who will opt out at this point given the close scrutiny they'll be under, but it's better to have them removed from the job before they start rather than after you've devoted weeks of training and coaching efforts only to find it's not going to work.



Giving more attention to these five areas – job/labor pool definitions, creative and broader advertising, job referral programs, psychometric testing for personality fit, and realistic disclosure about call center work life -- will ensure a better match of workforce to the work at hand of creating great customer experiences.

## TRAINING FOR CUSTOMER INTERACTIONS, NOT JUST TRANSACTIONS

There are two components that contribute to customer perceptions of a call and their resulting attitude about your company, including overall loyalty, likelihood of future business, and willingness to recommend to others. One critical part is obviously the transaction part of the call and its basic resolution. Did the customer get his problem solved or question answered in an effective, efficient manner?

The other component contributing to customer satisfaction is the “softer side” of the call. Not only do customers want their problems resolved and questions answered, but they want to be treated well during the process. They want to hear enthusiasm about the new product they ordered, empathy about an order lost in the mail, and patience during a complicated returns process. Every single call represents an opportunity to deliver great service, show an interest in the customer, and present a caring, professional voice of the company.

However, when you look at most call centers’ new-hire training programs, the focus of the program is all about the transaction with very little time or content devoted to the interaction aspect of the call. There are weeks of training to cover products, company procedures, system navigation, order entry, etc., but sometimes only an hour or two set aside to fine-tune telephone manners, listening skills, vocal capabilities, or techniques for handling difficult calls. And it’s these little nuances that can make a difference in establishing trust and confidence and building rapport with the customer.

Particularly with a younger workforce that has fewer life experiences and customer service background, it’s critical to allot some time to the basics of phone manners and how to address some common service and difficult call scenarios. Providing this kind of training helps to ensure that all staff are equipped for that next complaint call. Give them some tools to turn that raging mad customer ready to post his negative comments throughout social media land into a satisfied customer who is even more loyal than one without an original problem.

Here are five strategies to make sure you’re covering all the bases in your new-hire and ongoing training process:

1. Weave customer service fundamentals throughout your training program.

Customer service basics should be woven throughout the training class as well as into everyday training and coaching in the center. Frontline staff usually find this training as much more enjoyable than the system training, so it will be a welcome part of the day. And they’ll appreciate learning something that’s pertinent not just to the current job, but also a valuable life skill.

This customer service training is best delivered in small portions rather than crammed into one intense session. Make sure it’s interspersed throughout your product and system training and refer to it often so it becomes a constant element and part of the training culture.



Customer service fundamentals should include the following topic areas:

#### *Customer service fundamentals*

Help each person understand the important role they play in serving as the “voice of the company” to the customer. Customers these days sometimes have limited in-person contact so their call center conversations may be the only interactions they have by which to judge your company. Teach agents about not just the value of a single call, but the lifetime value of a customer.

#### *Vocal techniques*

It’s not just what you say but how you say it. Assist agents in putting their best voices forward with some polishing of vocal skills. Help telephone staff identify and remove “verbal viruses” and other annoying voice mannerisms. Everyone will love learning how to make the most of their voice, fine-tuning voice tone, rhythm, pace, inflection, and volume.

#### *Telephone etiquette*

Everyone can benefit by brushing up on basic phone manners. Set standards for what your welcome and greeting will be, as well as how you want calls to be closed. Review friendly procedures for transferring calls or placing callers on hold, as well as techniques for making the most of voice messaging.

#### *Phrasing and word choices*

All conversations, even when the answer is no, should have a positive tone. Teach your telephone staff how to turn negative statements into more positive ones to keep conversations upbeat and friendly. Ensure they know how to provide instructions in a helpful way and can recognize communications styles to match to the customers style.

#### *Handling difficult calls*

Everyone will get a difficult call now and then and it’s important each person knows how to handle challenging calls. Outline techniques for handling talkative or confused callers, as well as those that may be emotional or upset. All staff should be equipped to turn around complaint calls effectively and know how to handle angry or even abusive callers.

## 2. Incorporate adult learning techniques.

Whether trainees are learning customer service skills, product knowledge, or how to navigate the system, it’s important to develop a training program that addresses the learning styles of all types of individuals. There are three different learning and communications styles and it’s important to incorporate each one into your training program so each person can participate in the way they learn best.

The three learning styles are visual, auditory, and kinesthetic. Visual learners need to see content on paper and/or on screen. They process information by sight and will be ones that learn best by note-taking and reading information. Auditory learners need to hear the information in order to process it and will not benefit from reading the material as much as hearing someone tell about the subject. Kinesthetic learners don’t really process the information unless they’ve been able to get “hands on” with the information and practice it. Make sure you include all three learning styles so the needs of all students are covered in the training.

## 3. Build in periodic testing to check knowledge and skill transfer.



Make sure you're testing the trainees' new knowledge on a regular basis. Don't wait until the training is complete to assess their new skills or test knowledge. Periodic tests along the way will help you gauge whether the day's training has been effective and whether individuals and the group are ready to move on.

Use a variety of mechanisms to test new knowledge and skills. Use traditional assessment methods such as fill-in-the-blank and multiple choice written tests, but also use some fun testing approaches such as games or television contest formats to make the testing process fun and less intimidating. Build in content tests into actual work simulations such as role-playing calls that use new information. Let students create quizzes and test one another as another testing possibility.

#### 4. Reward "above and beyond" in the classroom.

If you're trying to create a workforce that's willing to give their all and go above and beyond for your customers, you'll want to demonstrate these types of behaviors throughout the training. Your trainers should demonstrate some behaviors that go beyond the expected and should provide examples throughout the class where employees have exceeded customer expectations and been rewarded for doing so.

Begin rewarding outstanding performance and giving beyond what's just required in the classroom. You will want to regularly reward great scores on tests, as well as bright ideas for process improvements, outstanding performance on role plays, etc. Get them used to an environment where great performance is noticed, recognized, and rewarded from the first day of training and beyond.

### PLAN FOR ONGOING DEVELOPMENT

Training should not end when the new-hire training program is over. While orientation and new-hire training should be sufficient to get the new employees on the phones and performing at a satisfactory level, it should never be the end of their training.

All staff will need regular, ongoing training and coaching to perform at their best. Many of the principles learned in the early days of training will need to be reinforced several times to take hold. Even if the staff learn customer service basics during new-hire training, they may not yet have enough of a context to fully understand how to apply it all yet. Therefore, it's vitally important that once they've been on the phones for a while, you reinforce the critical elements and techniques of providing great service.

Just as you would have refresher training for a new product development or upgrade, you'll want to have refresher training and next step, more advanced training to support their interaction skills. Getting together with their peers to learn and share proven service and support techniques is an essential element in learning the "how to" part of service as well as to provide the motivation to want to apply these skills on the phones.

### COACHING FOR OUTSTANDING PERFORMANCE

Coaching is all about helping someone improve performance and when done right, it's an experience frontline staff will welcome and appreciate. However, for many call center supervisors, coaching is simply a meaningless presentation of numbers or pointing out of errors with no positive roadmap for improvement. It's much like the basketball coach who points out that the last three shots were missed and that the team needs to score ten points in the next three minutes to win the game. Telling someone that handle time is too high and they need to work on call control does not constitute an effective coaching session.



The key elements for effective coaching involves defining performance standards, measuring and observing existing performance, identifying performance gaps or excellence, diagnosing root causes of performance problems, and coaching to either celebrate or correct. Here are several important strategies associated with effective coaching in the call center.

1. Define performance standards.

You can't coach unless you have defined standards of performance. A supervisor can't possibly sit down to coach without having clear definitions about what good performance looks and sounds like. Your call center will need to have a road map of detailed definitions of competencies, defined all the way down to specific measurable behaviors that can be observed.

For example, most call centers would agree that a desirable competency is to be able to demonstrate call control techniques that balance quality and service provision with length of call. The observable, measurable behaviors would be the specific call control techniques learned in a training class that keep talkative callers on track but still allow for the discovery of customer needs and ample time for presentation of solutions and needed information.

Part of the work in defining these standards is creating a definition large enough to allow for and even encourage the use of "above and beyond" behaviors to serve the customer. Be careful that call control techniques that should be followed don't handcuff the staff from identifying when extra time and effort could be used to make a real service impact with the customer. Make sure your performance standards include definitions of what "above and beyond" behaviors are desirable.

2. Identify the "why" of performance problems.

Before coaching, supervisors need to pinpoint the reason that someone has a performance gap. For example, if an agent has failed to ask additional discovery questions in order to recommend the best solution for a caller, the supervisor has to figure out why the agent performed that way in order to correct the behavior and encourage more customer-focused behavior the next time.

It is natural to assume that if someone has not performed and followed through on a call-handling technique that they must need more training. However, the person may actually know how to do the technique, but is being influenced by pressure to meet handle time numbers and therefore skipping through some of the call steps. It's crucial to identify the reason for the gap before beginning the coaching process.

3. Avoid "good...but" coaching.

The best way to encourage staff to repeat customer-pleasing behaviors is to catch them doing something right and rewarding those behaviors as soon as possible. However, since many supervisors are pressed for time and looking for ways to make the most of coaching time, it's tempting to recognize the good behaviors, but also take time to clean up any performance problems.

An important rule of "on the spot" coaching is to keep it simple. If you've heard someone do something great for the customer on the phone, praise that behavior as soon as you can. And try to make it all about the positive feedback. Let the person bask in the glow of recognition without any other corrections. Sometimes the good behavior is pointed out, but then glowing words are following by a "but..." statement that serves as a verbal eraser for the initial praise.



If you've heard someone do something great on the phones, go praise it and let it stand all by itself. There will be other opportunities to correct the fine points and mistakes. Just let the positive reinforcement flow when you catch staff doing something very right so they'll want to do it again.

#### 4. Look for coachable moments.

Part of the problem with call center feedback is that supervisors don't have enough time in their schedules to spend doing one-on-one coaching. In many centers, supervisors can be responsible for twenty or more people and finding devoted time to sit down to coach is nearly impossible. Therefore, when it's time for a coaching session, there is pressure to make the most of the time by describing "what went wrong" rather than looking for "coachable moments" and making the most of them.

Many call centers are missing out on these "coachable moments." We see many centers that pull four or five calls per month as coaching samples. These calls are generally selected randomly, but this random selection often just means haphazard. The calls selected for coaching rarely represent a true sample of call behavior and they don't always provide the right kind of coaching scenarios. Supervisors will sometimes just select the short calls so they can complete the requisite number of reviews, so the longer, harder calls probably don't get the attention they deserve.

One practice we've observed that works well to supply supervisors and quality analysts with coachable scenarios is to allow the agents to select some of their own calls for coaching. In one center they supply one great call to enter into the "Best Call of the Week" contest, providing a much-needed opportunity for positive reinforcement and recognition. The other call submitted is one where the agent needed help. Agents can provide these calls in a no-scoring format and get guidance on what to do better next time, but in a very supportive, non-judgmental way. This practice helps to get agents more involved in the process and helps them view coaching as a way to improve rather than a "gotcha" that catches them doing something wrong.

#### 5. Plan floor time for "on the spot" coaching.

In addition to planned call review time, it's critical that supervisors simply get out and walk the floor to look for coachable moments. This "walk-by coaching" is very effective, as agents get comfortable with on-the-spot coaching and recognition. The sooner that coaching can happen related to the positive or negative behavior it's meant to shape, the more effective the feedback will be. Therefore, it's important to schedule "walk by" time each day out on the floor in addition to the planned one-on-one time for more formal feedback.

Coaching is the single most important activity on the supervisor's list of job responsibilities. We need to make sure they're equipped with the right skills, manageable team sizes, and data in the form of coachable moments to make the most of their valuable coaching time.

## CALL CENTER MOTIVATION MYTHS AND MUSTS

Every fall, we hear the buzz as call centers prepare for Customer Service Week in October. Many devote special time and attention to showing appreciation to their frontline call center staff this month and use this time to implement new motivation programs to keep staff fired up and performing at their best.



Unfortunately, many call centers only worry about this show of appreciation and attempt at motivation for this single week. And while there may be great results from some of the short-term programs rolled out during Customer Service Week, many centers lose the Customer Service excitement by the time November rolls around. Zig Ziglar once said, "Some people say motivation doesn't last. Well, neither does bathing. That's why you have to do it often." Call centers should certainly know by now that keeping staff motivated to perform well on the phone is an ongoing strategy. You can't expect a one-week promotion to encourage staff to perform at their peak for very long.

Motivation is something you want to do often and you want to do it right. Below are five ideas and thoughts about motivating staff to perform at their best in the call center.

1. Forget about "one size fits all" motivation programs.

The hard thing about motivational promotions is that no matter how great or exciting the program is, it's not going to motivate everybody. Creating a successful motivation program is not a "one size fits all" project. What excites Bob may actually irritate Sally. What makes Rachel want to give that extra effort may push Alex out the door. Everybody is motivated by something and it's each supervisor's job to figure out what the motivators are for each person.

There are generally six categories of motivators:

- Social bonds (guidance, support, time, attention, encouragement)
- Recognition (acknowledgement of desirable behaviors)
- Rewards (tangible rewards, trophies, cool stuff)
- Development opportunities (career advancement, training, new skills)
- Teamwork (feeling part of team, networking, social activities)
- Fun (pleasurable activities in the workplace)

Rachel may just need lots of handholding and supervisor attention and will treasure simple recognition for work well done. Alex may prefer not to spend so much time with the boss, but values actual monetary compensation or tangible reward programs. Bob may like learning and will like attending a training class to acquire a new skill better than a gift card. Sally may be the people person that wants to head up the party planning committee or organize the holiday giving program.

The most effective supervisors will spend time with each employee to determine what their biggest motivators are and will organize activities and plan recognition and rewards to fit the needs of each person.

2. Model good listening behaviors.

One of the simplest things to do in motivating staff to perform is to demonstrate in an active way that you care about them. The best way to do this is to spend time with each person just listening. If your team members feel heard, understood, and valued, they will work harder to produce better results and make you proud.



One of the keys to providing great customer service is to listen carefully to what the customer needs. You can teach frontline staff how to do this by simply being a role model and a good listener yourself during your interactions with them. Be aware of common listening problems and take care you don't make these common listening mistakes.

**The Interrupter.** This person finishes other people's sentences or breaks in to share thoughts before the other person is finished. If you do this, your employees will lose patience with you and quit talking to you. You don't want agents modeling this behavior with customers since it will not make them feel heard and valued.

**The Defender.** Defensive listeners also interrupt. You may be defending your opinion or standing on a topic. However, if you do this it may prevent you from hearing the ideas and thoughts of others. Customers view this communications as company-focused and not customer-focused.

**The Transmitter.** These people spend much more time talking than listening. A wise person said we were given two ears and one mouth for a reason – to spend more time listening than talking. Demonstrate this with your staff and you'll see them do the same with your customers.

### 3. Recognize good performance on a timely, consistent basis.

One-on-one feedback is critical to reinforce desirable behaviors being demonstrated by your staff. Employees need to know what to repeat and what not to do again and recognized behavior is repeated behavior. Try to catch them doing something right and recognize it as soon as possible since the more time that passes between the behavior and the recognition, the less effective the feedback.

If you're waiting on perfect performance to recognize, you may be waiting a long time. Sometimes we need to recognize initiative as well as the final end result. Recognizing improvements along the way will help reinforce behaviors that you want to see repeated and the employee will make continual progress toward the ultimate goal.

Use different means to recognize. Always do one-on-one, but in addition provide the recognition in writing sometimes. And while one-on-one is nice to build the relationship between agent and supervisory, it's also good to sometimes provide the recognition on a public basis. Announcing accomplishments in team meetings, forwarding customer praise messages via email to all team members and management, and using great calls as training examples for the team are all ways to provide recognition on a more public basis.

### 4. Match rewards to employee values.

It's important not just to recognize outstanding performance, but to reward it in a meaningful way to each employee. Rewards fall into the area of social reinforcement (the recognition discussed above) and tangible reinforcement. In call centers today, this tangible reinforcement takes the form of gift cards, movie tickets, trips, electronics, and many other items. The key to building an effective reward program is to have rewards that are viewed as desirable and valuable by each employee.

Reward programs are not "one size fits all" in terms of perceived value. While one person may be thrilled with tickets to a theatre or sporting event, another would much prefer housecleaning services or a catalog certificate.



Some might perceive lunch with the company Vice President a powerful reward, while others may see this as an intimidating negative experience.

In selecting the reward options for your team members, careful consideration should be given to the “trophy value” of the reward. The effect of a reward will have more lasting value if there is visible evidence of it in the workplace, either on the wall or on the employee’s desk. The item can be an actual trophy or plaque or anything that serves as a visual sign that the employee has excelled in some way.

#### 5. Motivate by team as well as by individual.

When people are happy in their job, they’re going to perform better. One of the big factors in ensuring people are happy in their job is to create a work environment where they feel a part of a team and have a social network. One of the best ways to create this sense of belonging is to use a team structure in the call center.

Unfortunately, there are many work environment realities in the call center that limit team-building activities. The constant call demand prohibits everyone from stopping work at a certain time and joining in team activities or events. Team meetings are sometimes difficult to schedule on a planned basis, let alone on an impromptu basis as might be the case in other areas of the business.

Look for ways to build team cohesiveness and camaraderie. Dream up competitions between teams that are non-threatening and fun where participation alone, regardless of winning or losing, builds teamwork and generates opportunities for people to get to know one another. The more fun people are having at work and the more friendships they develop, the more likely they are to want to contribute in a positive way.

### MEASURING WHAT MATTERS FOR IMPROVED INTERACTIONS

Some of the standard quotes related to measurements certainly apply in the call center world. These quotes lend some insight into a performance measurement and reporting process that encourages the right behaviors related to customer interactions and call center performance.

#### 1. If you don’t measure it, you can’t manage it.

Let’s start with, “If you don’t measure it, you can’t manage it” as the obvious first choice. Without data and numerical evidence of performance, it would be awfully hard to identify what to reinforce and reward and what needs work.

Many of the strategies discussed so far focus on people and processes and not technology. However, we do need ways to measure and ensure that these parts are working and that’s where technology plays an important role. Having tools that provide historical reporting and dashboard indicators of both individual and call center performance give us the evidence and information we need to more effectively monitor and shape performance of teams and individual agents.

#### 2. Just because you can measure it doesn’t mean you should.

Many call centers today have gotten a little carried away with the numbers, so here’s another quote to live by – “Just because you can measure it doesn’t mean you should.” With ACDs and reporting tools that enable hun-



dreds of reports in every imaginable format, it's easy to get information overload. It's important to weed through all the possibilities and settle on some reports that give you actionable information from which to make changes and reinforce behaviors.

Just because you have 185 possible reports available from the technology doesn't mean you need to use them all. Use them as signals to indicate performance problems or outstanding work and then go out on the floor to coach the specific behaviors that lead to the numbers you want to see.

3. Just because you should measure it, it doesn't mean you can.

The reverse of the previous statement is also true. We measure many things we don't need just because reports are readily available, but unfortunately some of the things we most need to know in terms of reviewing the success of our customer interactions are not easily measurable.

The most obvious example of something we should measure but can't – at least easily – is first call resolution (FCR). It's the measure most closely correlated with customer satisfaction and loyalty, and yet it's one of the hardest things to measure. There's no single report that pops out this number and so it has to be pieced together from many sources. It's a great number to know as a measure of customer satisfaction and also a measure of team and individual performance that points to relevant coaching opportunities, but it takes some work to get there.

4. You can expect what you inspect.

Be careful which measures you choose and what gets fed back to the staff, because, "You can expect what you inspect." The best example of this one is, of course, average handle time. If the numbers you're feeding back to agents at the end of the month are their average handle time statistics with how they compare to the goal, the next time the staff are likely to give you a number that's closer to expectations.

For example, if staff have been told that the handle time expectation is 300 seconds and you've been reporting numbers that show them at 330 seconds, then they'll look for ways to shave off the 30 seconds, which could include rushing the customer or not doing proper listening and discovery questions to uncover sales possibilities. Coaching to the right behaviors, rather than showing them the numbers (like the coach pointing to the deficit on the scoreboard) will give better results than focusing on the numbers alone.

If you torture the numbers long enough, they will admit to anything.

Finally, remember that "If you torture the numbers long enough, they will admit to anything." Schedule adherence statistics illustrate this one best. Some centers adjust the numbers so much to reflect schedule exceptions that adherence numbers are meaningless. In an effort to meet adherence goals, the numbers are manipulated past the point of providing coachable information. So watch out that in your quest to hit performance numbers, you're erasing the very information that can assist in actually making the performance better.

## SUMMARY

Getting a "wow" customer experience to happen requires two key ingredients – the transaction and the interaction. Much of the impression that is left after the call is molded by the "interaction" part of the exchange. Getting staff to deliver their end of great interactions requires that five essential elements be in place:



1. Hire the right people for the job.
2. Train staff for the “interaction” as well as the “transaction” part of the customer contact.
3. Coach regularly to fine-tune performance and reinforce desired behaviors.
4. Develop individualized motivation programs that encourage each employee to excel.
5. Assemble a system of quantitative and qualitative measures to ensure you’re getting the behaviors you want.

However, the best of interactions can’t overcome a transaction that was handled poorly due to system or technology issues. Frontline staff giving their all won’t be able to erase customers’ transaction problems. Just as it’s important to get the right people in place, train them properly, coach for improved performance, and reward desired behaviors, it’s also critical to have the proper technology in place to support the transaction. Solutions that provide ease of use for both the customer and the agent are critical for seamless transactions where great interaction skills can shine through.

#### ABOUT THE AUTHOR

*Penny Reynolds is the Founding Partner of The Call Center School, a Nashville, Tennessee-based consulting and education firm, where she develops and teaches courses on a wide variety of call center topics and speaks at many industry conferences and association meetings. She has spent over 20 years in the call center and telecommunications industry and is the author of several call center management books.*

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