

10 Key Principles to Maximize Performance Management in the Call Center

A  CLEARVIEW E-book



Discover 10 tried and true principles of an effective performance management strategy in this E-book.



01

DATA AGGREGATION

Call centers must have a one-stop-shop for all reports to keep up with the speed of customers and competition. It's now more important than ever for call centers to automatically aggregate all raw data such as ACD/IVR, CRM, QM, WFM, LMS and Survey onto a unified platform that can be customized and shared.

Each of the tools listed above provides a different perspective on the performance of your operation. Aggregating data from those tools is a crucial step to making informed, data driven decisions. Data from the contact center can be enlightening for all departments such as marketing, sales, finance and information technology. Companies like NICE inContact, Amazon, American Express, and Starbucks rely on data to make important decisions (ICAS), and you should too!

How can aggregated data improve your call center?

- Experience balanced and reliable data
- Make data-driven decisions
- Reduce inefficiency
- Identify data correlations more easily
- Gain access to understandable data immediately
- Generate actionable insights
- Easily identify the root cause of a problem
- Understand your customer better
- Increase revenue

“Data centered organizations are 23 times more likely to acquire customers, 6 times as likely to retain those customers and 19 times as likely to be profitable as a result.”

- *Mckinsey & Company*



02

REAL-TIME ACCESS

Long gone are the days of postcards and morning newspapers. Your call center agents are living in a world with instant news, social media and text messages at their fingertips 24/7. They are reliant on real-time feedback to make decisions both inside and outside of the workday. Without real-time feedback, agents don't know where they stand, which leads to disengagement. In fact, "four out of 10 workers are actively disengaged when they get little or no feedback" (Forbes).

Not only is it important for agents to receive real-time feedback, but for supervisors and executives to have access to real-time feedback 24/7. This will enable them to identify bottlenecks and pain-points in real-time to prevent dissatisfied customers. Afterall, "more than 50% of customers switched service providers after a poor customer service experience in a single year" (Accenture).

What real-time metrics should be measured to ensure customer satisfaction?

- **Customer Satisfaction:** how satisfied customers are after their call
- **Service Level:** the percentage of calls answered within a specified number of seconds
- **Average Time in Queue:** average amount of time callers spend waiting to be connected to an agent
- **Average Speed of Answer:** average amount of time it takes for a call center to answer phone call
- **Average Handle Time:** duration of one call
- **Average After Call Work Time:** average time spent on tasks after each customer interaction
- **Average Resolution Time:** the median amount of time it takes to resolve a customer's issue
- **First Contact Resolution Rate:** number of incidents resolved on the first contact

"Real-time analysis offers a big step up from the traditional, manual call monitoring processes."

- *ContactBabel*



03

ENTERPRISE VISIBILITY — The Basketball Analogy

Player Perspective (Agent): Imagine you're a player on a basketball team. You shoot the basketball and know it felt good, but don't know how your performance compares to others on the court or if you're winning or losing. Are you motivated to perform well? No. Good basketball players want to know performance stats on every defensive and offensive play immediately. It's no different for good call center agents. If agents don't have access to real-time data on their own dashboards, their work can quickly get un motivating.

Team Captain Perspective (Supervisor): Imagine you're the team captain of a basketball team. Members of the team have a general feel for how they're performing individually, but they don't know how to focus their efforts to work together efficiently. Furthermore, you sporadically gain insights from various areas of the game like free throw percentage. Your team is probably frustrated with you, but it's not your fault. That's what it feels like to be a contact center supervisor when your agents can't see their feedback in real-time, and when you aren't getting all of the reports you need in a timely, aggregated manner.

Coach Perspective (Executive): Imagine you're the coach of a basketball team. You aren't able to watch the game from start to finish because you have to cater to competing events around you. One player is injured, another one wants you to show them how to improve their shooting technique, and the referee wants to talk to you about what happened in the first quarter. You don't know holistically about each of your players performance until after the game. You don't know when to let players take breaks, who is performing well, or to whom you need to offer praise or development. That's what it's like when a contact center doesn't have enterprise-wide visibility. Contact centers should have real-time dashboards with modules and metrics specific to each role.

"When employees feel empowered at work, it's associated with stronger job performance, job satisfaction and commitment to the organization."

- *Harvard Business Review*

How to create enterprise visibility?

- *Role-based Dashboards*
- *Wallboards*
- *Dashboard Sharing*
- *Dashboard Subscriptions*
- *Leaderboards*
- *Automated Coaching*

04

GAMIFICATION

Gamification is about taking a task that is not a game and applying game mechanics to improve employee performance and engagement. Traditional contact center gamification with whiteboards and raffles is manual and inconsistent. Gamification has evolved with technology. Available software like ClearView Gamification can eliminate tedious hours spend tallying results by automating processes.

Components of an effective gamification strategy are:

- **Competition:** A study by the Harvard Business School found that "competition increases physiological and psychological activation, which prepares body and mind for increased effort and enables higher performance." Competition can be **Peer vs. Peer:** According to DMG Consulting, "It's a win-win when agents are permitted to wager their reward points to 'level-up a peers performance.'" Agents can also compete against themselves with **Self vs. Self** gamification. Or competition can be **Team vs. Team**, which allows for a feeling of togetherness and teamwork.
- **Consistent Recognition & Reward:** According to Gallup research, employees need some form of recognition at least once every seven days. Consistent repetition is essential in helping employees understand what behaviors lead to success. In a call center, distributing virtual badges or coins that can be used to purchase physical prizes has proven to be a manageable way to automate this process.
- **Clear Rules and Goals:** Games with clear rules can help agents set realistic goals to give them a sense of purpose and motivation. Setting goals is linked with self-confidence, motivation and autonomy (Locke & Lathan).

The number one factor contributing to high satisfaction for agents in a contact center is Rewards and Recognition Programs.

- *ICMI*



05

AUTOMATIC COACHING SESSIONS

The longer agents work at a company, the more successful they will be. The problem is that 57% of agents who voluntarily leave their job are either entry-level or intermediate (Mercer's US Contact Center Survey). Most of these agents leave because they aren't properly coached to be successful and confident.

Spending time and resources on coaching and developing agents will help them build the necessary skills to be successful and have a long-lasting career at your company. The best part is that the impact of good coaching goes far beyond the contact center. Companies that provide high quality coaching can reach 7% greater annual revenue growth (Business 2 Community).

How to improve coaching in the contact center?

- **Define goals and metrics:** It's important to help your agents define specific, measurable, attainable, realistic and timely goals. This will give both the agent and coach a strong base to gauge performance on.
- **Maintain consistency:** Coaches must be consistent with their expectations, communication and discipline in order to expect consistent, positive behavior from agents.
- **Give positive feedback:** Focus on your employees' strengths. Managers are 30 times more likely to actively engage workers when they focus on employees' strengths (Hubspot).
- **Be timely:** Data shows that employees, particularly millennials, want regular ongoing feedback (SHRM). Real-time feedback is more productive than annual reviews.
- **Invest in Coaching Tools:** Coaching software can help simplify employee management and boost agent engagement.

"It's the agent's experience that genuinely impacts the customer's experience. More specifically, it's the agent experience that impacts agent happiness, which powers the customer experience, which builds customer engagement!"

- *No Jitter*



06

POSITIVE COMPANY CULTURE

A positive company culture is linked to improved employee engagement, increased productivity and higher profit margins (Built In). According to Glassdoor, 56% of 5,000 working adults ranked a strong workplace culture as more important than high salary, while 75% said they'd consider a company's culture before applying for a job. A strong company culture can be a contact center's secret weapon.

How to create a positive company culture?

- **Make Your Why Known:** Employees who believe their company has goals outside of profit are 27% more likely to stay at a company (Built In). In your contact center, you can display company mission statements, values and cultural messages on your walls or digital Wallboards.
- **Create a Social Environment:** Office friendships increase employee engagement and productivity (Fast Company). If there's a strong sense of belonging in the workplace, employees don't want to let their co-workers down. So make time for team-building activities like barbecues, service projects and holiday parties. Boost daily social engagement and camaraderie through gamification. Be sure your gamification strategy helps your employees express themselves through customizable profiles.
- **Offer Flexibility:** Employees can work from home and have flexible schedules while still feeling positively about their company culture. According to an ADP Institute survey of 19,000 workers, 55% of remote workers said that they feel part of a team. If possible, offer remote or flexible scheduling options. This gives employees a feeling of autonomy and a reason to stick with a company longer. In order to keep strong culture among a remote workforce, make sure remote employees have a Dashboard that connects them to co-workers, individual performance, company performance and a coach.

"Employees, who enjoy going to work and feel that they are treated right, are much more likely to stay with their current employer and perform their best.

- *Five9*



07

DATA-DRIVEN HIRING

A bad hire can be an expensive mistake. According to the Human Resource Institute, it costs about \$10,000 to \$15,000 to replace a front-line employee. However, you are lucky if they leave quickly! Sometimes a bad hire will stay, produce low quality work, destroy company culture and/or cause other employees to leave. A bad manager can be even more detrimental to a company. It's important to have a stealthy strategy to hire and promote at your contact center.

How can you hire good employees and promote the right people?

- **Track Employee Attributes:** A strong performance management system will allow you to assign attributes like education level, method of recruitment, job experience, trainer, etc. to each employee. By doing so, you can identify patterns and trends in your best employees to improve hiring processes.
Ex: If you track employee job experience and find out that your best employees used to work at fast-food restaurants, you might want to change your recruitment strategy to target fast-food workers.
- **Conduct Surveys:** Conducting surveys throughout each employee's span of employment will help you learn what makes them join, stay and leave. If you look for commonalities amongst employees who work hard and stay at your company, you will be able to make more tactical hiring decisions.
Ex: If you find out from a survey that your agents who stay the longest are 10/10 satisfied with the rewards in your recognition program, you may want to conduct another survey to find out rewards that each individual would want in your recognition program. Then focus on having a variety of rewards that will make everyone 10/10 satisfied.

“25% of agents left the company in the past 12 months; 20% of agents left the contact center but stayed within the company; and 18% of agents changed positions in the contact center.”

- ICMI Survey



08

QUALITY MANAGEMENT

You've probably heard this before: "This call may be recorded or monitored for quality and training purposes." That's the base of quality management (QM). It's a way for companies to manage how well their agents deliver customer service.

Why do you need QM?

- Quality management is one of the most effective ways to improve customer service. It will help companies spot problems by proactively monitoring interactions to maintain quality standards, ensure regulatory compliance and boost customer experience.

Best practices for a successful QM program are:

- **Create an omni-channel approach:** According to Hubspot Research, consumers want to communicate with customer service reps through email (62%), phone (48%), live chat (42%), "contact us" form (36%), Facebook Messenger (21%), Twitter (10%), Slack (5%), other (1%). The only way to keep all of these channels strong is to make sure you have a system in place to manage the quality of each.
- **Connect QM data to agent dashboards:** Quality management is a tool to manage agent performance. Therefore, it's necessary that agents have access to track their QM score in real-time. This will promote a proactive atmosphere in the contact center.
- **Gamify QM:** Drive a positive customer experience by challenging agents to perform based on quality scores and rewarding them with digital or real-life prizes.

"87% of consumers are willing to buy more products and services from a company that provides an exceptional customer experience."

- ICMI Survey



09

PRESCRIPTIVE ANALYTICS

In the call center industry, common profit-killing diseases are known as high attrition, low productivity and unmotivated employees. When call centers suffer from any of these issues, it's important that they get continuous remedies from the call center doctor (a performance management system) who will give them prescriptive analytics.

Prescriptive analytics is the use of technology to help companies make important decisions based on data. Oftentimes, contact center systems can diagnose problems well, but don't offer solutions to those problems. A strong performance management system allows businesses to leave guesswork behind by using data to suggest a course of action or strategy.

What are simple ways to use prescriptive analytics in the call center?

- Automatically generate coaching sessions triggered by performance thresholds
- Shut down costly behaviors by notifying supervisors with alerts when metrics fall out of objectives
- Give agents clear goals and then provide agent-level reporting that notifies them with alerts and coaching sessions when KPIs don't align with goals
- Use agent attributes to prescribe a hiring remedy
- Use heat maps to identify call fluctuations before they become a problem
- Implement gamification to prescribe agents coins and recognition for good performance

"It is a capital mistake to theorize before one has data."

- *Sir Aurthur Conan Doyle*



10

BEHAVIORAL INTELLIGENCE

Business intelligence (BI) tools are great to visualize data and provide insights into operational efficiencies. But, how can companies act upon the readings from a BI tool to achieve desired business outcomes? The solution is to address the behavior of the employees contributing to those outcomes.

Behavioral intelligence is not about just focusing on wins, but focusing on the driving factors behind wins. It's drilling down to the data-level of each agent, team, floor and location to find out what is making them tick or flop. It's developing intelligent rules, objectives and goals to set each agent, team, floor and location up for success. Behavioral intelligence requires the aggregation of KPIs and important metrics to dial into the "how" and "why" behind performance wins and losses.

By focusing more on the processes that drive wins, supervisors can empower agents to concentrate on what they can control, which leads to less stress and shame about factors that are uncontrollable in the first place. This will boost agent confidence and set them up for successful calls in the future.

Benefits of Behavioral Intelligence:

- Save time
- Save money
- Reduce stress
- Reduce escalations
- Alleviate problems before they happen
- Create space for flexibility
- Give agents and supervisors peace of mind
- Boost agent confidence
- Increase customer satisfaction

86% of customer experience executives cite Agent Experience (AX) as the single factor that has the most impact on CSAT

- *Gartner*



A strong **Performance Management** strategy can take your call center from surviving to thriving.



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