

## 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

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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.

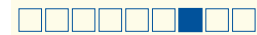
World-class contact centers employ agents who have the ability to create an emotional connection with their customers. Zappos received a lot of media attention for offering new employees \$2,000 to quit during the initial training program. This type of people “guarantee” requires everyone in the organization 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.

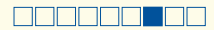
### POLICIES = NO

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



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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

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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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