Best Practices in Monitoring/Coaching Agent Calls

Dr. Jon Anton
Purdue University Center for Customer-Driven Quality

Anita Rockwell
BenchmarkPortal

According to our latest research statistics, the vast majority of call centers (over 95%) are monitoring calls.

If you compare their call monitoring/coaching processes, you will find that there is wide disparity with respect to:

- why they monitor (some centers are required monitor calls to comply with their company's ISO 9000 quality program).
- what, when, and how they monitor.
- how they apply what they learn back into agent training and call quality improvement.
- how they link their quality monitoring/coaching process to continuously improve customer satisfaction.
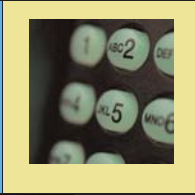
What Percentage of your Customers give you a Perfect Score for Customer Satisfaction?

With Monitoring Systems 56%
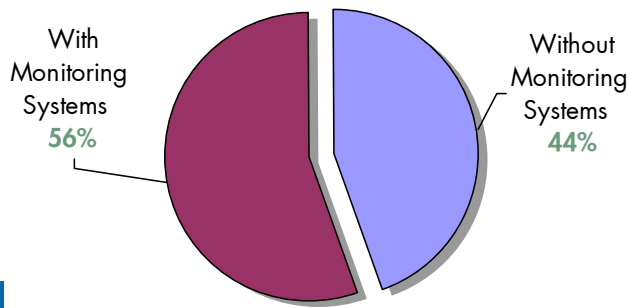
Without Monitoring Systems 44%

fig. 1

Since our research has shown a direct correlation between agent call monitoring/coaching and customer satisfaction (see Figure 1), how can call center managers determine whether their monitoring/coaching process is improving caller satisfaction?

Typical monitoring/coaching programs feature the following:
• Call monitoring of agents at least once per week
• An electronic monitoring system that records voice and screen data to speed up and simplify the observation process
• A detailed monitoring form that lists clear and fair performance objectives
• Regularly scheduled feedback sessions with agents by supervisors / coaches
• Periodic training sessions to address "chronic" issues
• An incentive program to motivate agents to higher quality call handling performance

You may be saying to yourself, "That sounds like a solid monitoring program to me. What's the problem?"

With the above in place, we have discovered at least one more essential step. A step that very few call centers have taken is to link call monitoring/coaching to caller satisfaction.

Most call center managers assume that a call monitoring/coaching process such as described above is helping them to achieve or improve their customer satisfaction performance. What is typically overlooked is relating the resolution of the customer's inquiry and their calling experience to the monitoring/coaching process. Without this link, no call center can legitimately claim that their monitoring/coaching process is achieving the level of best practice.

WHAT ARE BEST PRACTICES IN CALL MONITORING?

A best practices call monitoring/coaching process must be able to determine whether the caller is benefiting from your call monitoring practices, including direct customer feedback, and must include process mechanisms that correlate improvements in your monitoring/coaching process to improved customer satisfaction.

A best practice call monitoring/coaching process should include the following elements:

Data Collection
• A significant volume of calls is recorded. Agents know that any call could be recorded at any time.
• The entire customer experience is captured (from initial hold time through transfers to other departments, etc.)
• The screen navigation is also recorded with each call. Customer feedback is collected via IVR immediately following the call. Best case would be to have your CEO record the IVR request for feedback.
• Customer feedback is collected via IVR immediately following the call.

Call Selection
• The calls that collect customer feedback (through IVR) are flagged for evaluation (If not enough volume for statistically valid sample, additional surveys are also automatically selected).
• A heavier emphasis is placed on reviewing calls for new agents to help learn the preferred "branded" style of the company and to help them gain confidence.

Agent Self-Assessment

- The agent is scheduled for a period of time each week (one hour) to evaluate his or her own calls and select a portion to forward for formal evaluation.
- The agent listens to each call with an ear toward quality service and caller satisfaction (to create the mindset that he/she wants to have as many great calls as possible to choose from).

Formal Evaluations

- A separate team conducts the formal monitoring/evaluation (not the direct supervisor/coach).
- The formal evaluators "flag" sample calls for the direct supervisor as examples of good customer service.
- In some cases, as agents become more proficient, fewer calls may be evaluated.

Side-by-Side Observations

- The direct supervisor/coach schedules one-hour side-by-side observations at least every other week with each agent. These sessions are considered a priority.
- The side-by-side observations are focused as much upon process improvement as service-delivery.

Call Evaluation Criteria

- The formal call evaluation criteria should be customer-based metrics (e.g. was the issue resolved on first contact; how hold time/transfers were handled, etc.)
- The evaluation criteria are based on drivers of customer satisfaction.

Feedback Timing and Methods

- The agent should receive the evaluations as soon as they are completed (not collected and delivered in bulk).
- The agent has desktop access to his/her scores as they are completed.
- The agent is not dependent on the supervisor's schedule to receive the feedback.
- The supervisor has access to the results.
- The scores/evaluations are tracked over time so that agent can see progress and observe month-to-date results.

Total Picture of Customer Experience

- A reporting system that is integrated back to the agent, which includes:
  - ◆ Customer evaluation of the call, including the ability to hear first-hand any verbal comments the customer makes.
  - ◆ The score from the call evaluation
  - ◆ The ACD information about how long the caller waited in queue before reaching an agent, call length, hold time, whether the customer was transferred, etc.

Agent's Performance - Emphasis & Development

- The monitoring scores should be a major portion of how the agent's overall performance is evaluated.
- A heavier emphasis is placed on the customer satisfaction score and monitored call score than on internal metrics such as attendance.

Closed Loop Process

- In some cases, we have witnessed success when an extension of the training unit acts as the Feedback Coordinators.
- In this role, trainers can also assess where they need to improve the basic training.
- The training unit can also create plans for each agent based on the results.

Rewards & Recognition

- A rewards/recognition incentive program for positive agent performance
- The highest rewards are tied to customer-driven metrics, such as percent resolved on 1st contact or percent of perfect scores via IVR survey.

## Other Areas Where Best Practice Monitoring/Coaching Can Help the Company

- Use the monitoring process to identify service improvement opportunities (the team/partner evaluating the calls would double as a service-improvement advisor. Since they are already listening to a significant volume of calls, they will see patterns and hear opportunities every day).
- The best practices should be shared in training classes (and also negative examples like broken processes, customer irritants and ineffective service policies).
- Use the monitoring system to capture marketing information.

With the recording systems available today, most calls can also capture indicators about the call, such as which product the customer was calling about.

- Consider creating a Listening Room where busy senior leadership can tap into a queue line to randomly listen to calls. Calls are piped into the room (no need to hold a receiver or headset). By listening to customer calls, it helps everyone stay more attuned to the external customer-focus.

In June 2002, we surveyed over 500 call center managers and asked them "What is your biggest challenge with monitoring/coaching?"

As shown in Figure 2 below, many indicated that their biggest challenge with monitoring/coaching was a "Lack of Time" to monitor:

Biggest Challenge in Monitoring
One Minute Survey - June

fig. 2
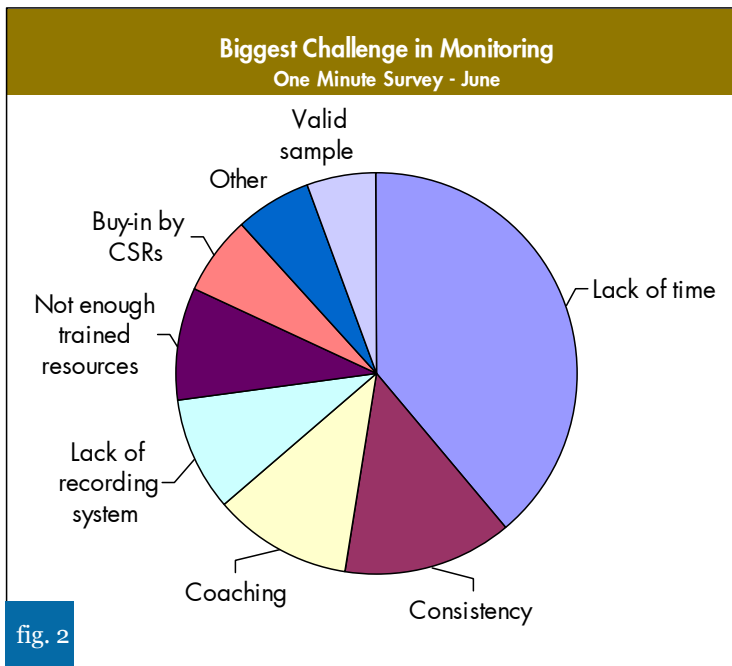
## WHAT IS YOUR BIGGEST CHALLENGE WITH MONITORING/COACHING?

Comments from survey participants validated our finding:
- "Basically, time is the biggest challenge. With all my other duties, I tend to put monitoring/coaching off."
- "Time. Given that our environment is very reactionary, monitoring and coaching is given a lower priority than the fire of the day. At the end of the month, supervisors are struggling to get through all of their quality monitors."
- "Juggling of priorities is the biggest inhibitor. There is always something more important or more attractive to attend."
- "Even with the monitoring done, taking the time to meet with each rep takes time. Too much delay from the monitored call to the coaching session."

The survey also asked participants to give a breakdown on time factors interfering with monitoring/coaching (Figure 3 below).

The majority, more than 55%, reported that there was "Not enough time to just DO them".

The results of our survey underscored the fact that most monitoring/coaching processes are not only failing to meet best practice standards, but are also being pushed aside in favor of other priorities. Most call centers have not begun to understand how no their monitoring/coaching process is directly tied to and affects customer satisfaction.

Breakdown of Time Factors

fig. 3
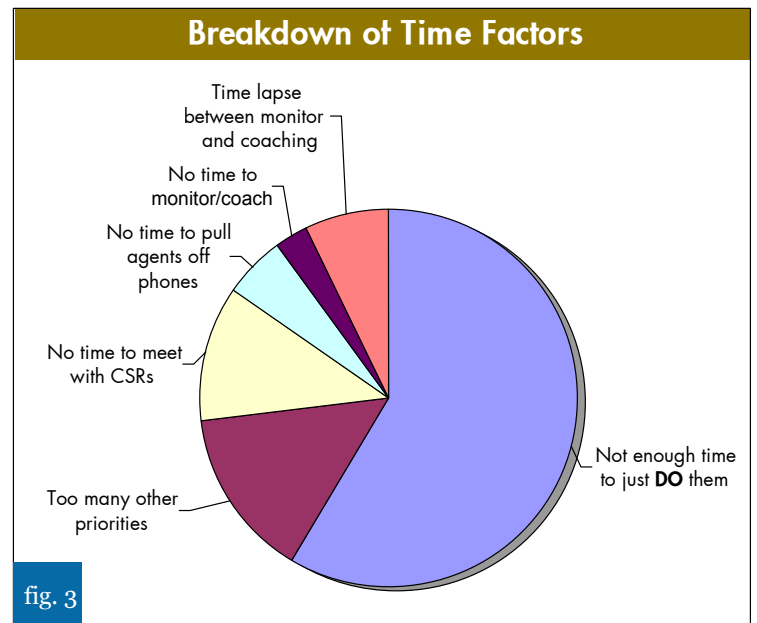
CONCLUSION

 Call centers are evolving rapidly, and monitoring/coaching programs must keep up with the pace of change. While the fundamentals of agent observation may still hold true, call centers need to start honing in on the entire customer experience when evaluating service quality.

Agent centric monitoring/coaching doesn't present a broad enough picture of what's happening to customers when they interact with your center. A customer centric call monitoring/coaching processes, properly implemented, is essential to attaining the level of best practices.

Dr. Jon Anton is the director of benchmark research at Purdue University's Center for Customer-Driven Quality. Dr. Jon has guided corporate executives in strategically re-positioning their call centers as robust customer access centers through a combination of benchmarking, re-engineering, consolidation, outsourcing, and web-enablement. For more information visit www.BenchmarkPortal.com

Benchmark Portal

A Datamart of Best Practices™