

Moving Metrics Into Action

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Moving Metrics Into Action

“Good customer service is more important now than ever” is a headline that has been used many times over the years to help get companies to realize where they need to focus. By now, I think we all know that good customer service is a necessity in every industry and is always important. What continually evolves is how customers define good service and the ways they tell each other about it. The Internet has given us a new vehicle for sharing praise and disappointment for companies with which we interact. Online forums and shopping Web sites have hundreds of ratings, comments and results – and many are focused directly on the service provided. Today, that one exception that falls through the cracks and upsets the customer can become the documented example that thousands of people read and consider prior to choosing to do business (or not) with a company.

“Every time a customer calls or you call a customer — you have an opportunity and a choice...Are you creating frequent, lasting, memorable impressions?” Jeffrey Gitomer

So, is it really true that it’s more important now than ever? I think it’s just the opposite – anything that’s just “ok” puts you at risk. Companies now have to be looking for new ways to continually raise the bar and provide experiences that make customers proud of their decision to do business with them – and that compel customers to tell others about it. Negative comments posted on the Internet can bring a company to its knees; positive comments can take your organization to the next level. Your customer service today must be so good that people are happy...and willing to tell everyone – whether they know they’re telling thousands or not.

Contact centers are at the heart of the customer service experience. The best organizations have developed new ways to leverage their contact center as a true competitive advantage. In the past, companies could differentiate themselves from the competition with their customer-facing technologies – the Web, speech, routing, etc. Nowadays, even the smallest organizations can make their systems act just like that of the big enterprises -- the playing field is a whole lot more equal. The real differentiator between companies is the service they provide on every interaction and the impression that is left with the customer when they hang up the phone. In contact centers, our technologies provide a tremendous amount of data, and the best organizations are finding new ways to use this information to transform the business.

The data we get is often transformed into metrics that we use to help us validate, change, improve and enforce. What often gets lost is that data and metrics are simply indicators of needs or behaviors...and if we spend our time trying to change the metrics, the needs and behaviors are never moved in the way they should be. What follows are some new ideas on how to help your organization refocus its view of metrics, find new ways to funnel leadership influence, and develop plans for continually improving service in the contact center.

What Customers Want

We often lose sight that we're all consumers – everyone that works in customer service is a customer and with that comes a tremendous amount of experience and expertise. Many companies to whom I consult spend countless hours trying to figure out what their customers want without tapping into their own experience as a customer. We often approach our own product or service through the company's eyes and have a hard time looking beyond the organizational chart for solutions. I often find myself moving my clients from thinking like internal product leaders to just being a buyer, consumer, customer and recipient of service. When you're able to make this transition in your mind, you'll find that customers are pretty simple and just want a few things:

- Promptness and accuracy – get to me quickly and don't make me wait too long. And once I'm being serviced, I need you to do it right.
- Quality for the time invested – my investment in your company is time. My time is valuable and I'd like you to make sure you respect the fact that I am taking time out of my life to work with you and I expect a return on that investment.
- Real first-contact resolution – let's try and get this done the first time without any further action on my part...meaning, I just want to tell you my problem once and you find a way to fix it. I don't care about your internal silo, relationships or departments – just go do it when I tell you.
- A choice in automation – this isn't my first time doing this and I know what I can do myself and I'm calling you because I want to talk to someone because I know that I need to. Let me decide how I want to interact with you – after all, as the customer, I have the choice to go elsewhere.

What Most Companies Want

Not many companies call me simply because they want to sustain mediocrity or reduce the service provided. Most realize they've got to provide good service, and many have their needs clearly documented:

- Most of the companies know that they need to provide service that is timely, efficient, professional and accurate.
- Many have read the book and know that companies with happier employees provide better service to customers.
- They also know that they need to develop an environment that is more flexible and respects the talents of agents that interact with their customers every day.

Unfortunately, this knowledge of need gets lost in the application and we end up sending the wrong message to the frontline leaders and agents, via:

- Metrics and reports and metrics and reports – it often starts with something like “what get’s measured, gets done.” And, that’s not a bad place to start, but measurement doesn’t lead to change when people are what need to change...not the metric. So we give our leaders a lot of metrics, graphs and charts on a daily and hourly basis – so many that leaders often end up ignoring the signals because they don’t have time to open, much less digest, all the numbers
- No time to coach or get coached – because centers spend so much time looking down, they end up missing out on the opportunities to make real change – via a formal coaching and development session. Without planning, there isn’t the time, and without the time, coaching becomes a “might” versus a “must.” Coaching is key and something no one can grow without...and it’s not just for agents – all leaders need coaching on a regular basis.
- Beeping wallboards and frustrated customers -- it seems that just about every customer has realized that if you’re not happy, ask for a supervisor. And just when you get the customer that got frustrated about the hold time, your wallboards begin to bleed red and let you know there will be more frustrated customers to follow. Upset customers happen, but the resolution is often lost at the end of the call. The best centers treat every frustrated customer as a learning opportunity – documenting the resolution and telling everyone about it...yes, even the frontline reps.
- Pressure to do it faster and cheaper – someone, someplace realized and then documented the fact that a shorter phone call means you needed fewer people to meet accessibility metrics (service level, ASA, etc). And most people also know that shorter calls, not done right, end up creating more work and frustrated customers. Unfortunately, the part that

is not done right isn't captured by daily reporting tools, and leaders become focused on what they can measure – how long is it taking, and pointing this out to those taking a long time. Metrics and reports don't reduce agent interaction time, and many centers have felt the pain of a misguided focus on handle time.

“Organizations don't execute unless the right people, individually and collectively, focus on the right details at the right time.” Execution, The discipline of getting things done, Larry Bossidy and Ram Charan

Basics of Improving Results in Processes, Organizations and People

There are several approaches to driving change. Some are more formalized than others, but all have some common themes. These common themes should be kept simple enough so that even those without an education in leading change can incorporate them into their daily ritual. The five simple activities below can be applied to people, processes or entire organizations -- and the first one is by far the most important:

1. Focus on the drivers – for contact center leaders, this is key. Often, we're so focused on the numbers that we forget about what is driving the numbers – people and their behaviors. A good first step is to take each one of your daily metrics and draw a direct correlation to a driver. The driver could be a single activity or a combination of several – the goal is to have a better understanding of why things are moving and use this understanding as the foundation for change.
2. Understand the root causes – once you know the drivers, you can begin to drill and document the root causes. This is where you begin to focus less attention on numbers and look harder at the reasons the drivers have been positively or negatively influenced. Doing this creates the foundation for conversations that have little to do with any type of metric and helps to focus everyone on what needs to be different.
3. Develop action plans – the root causes point us in the right direction but moving anything takes planning. This is one thing that most people know, but for one reason or another, don't do. It doesn't have to be anything formal or scary – simple documentation to use as a reminder/checklist to help ensure you're on the right track.
4. Communicate expectations and accountabilities – this is where you start to see the fruits of your labor. If you're trying to move a department or organization, you'll divide and conquer – giving those that can influence change some skin in the game and clear guidelines. If attempting to move an individual, you'll want to be clear on what needs to change and ensure they understand their role and responsibility. Again, keep it simple; it's less about the formalization and more about the communication.

5. Measure results and take action – this is when the process becomes continual – meaning, you know what you’re looking for and if it moves, you’re on the right track. At this point you may discover many things -- you’re focusing on the wrong cause, you’re expectations aren’t realistic, you’re driving another metric in the wrong direction, you’re on the right track and need to accelerate...lots of potential outcomes. The key is to not worry about getting it right the first or second time... it’s about continual improvement – in the thing you’re trying to influence and the process you use to measure and track.

Revisiting Accessibility Objectives

Just about every organization with an ACD to route calls also has some time of accessibility measure – service level, average speed of answer, abandon rate, etc. These measures are important to contact center leaders and are often what we look to in determining what to change in our organization. Just like with how most view customer service, it’s often difficult to separate the internal needs from what it means to the customer. What follows are three views of accessibility objectives: How companies traditionally view them, and two new, more effective ways.

Accessibility objectives are often viewed from the company or department perspective with a very inside-out focus. In many cases, those tasked with responsibility for meeting the objectives had little input into the development of the goals and their understanding has been passed from previous leaders. Some of the common internal views of accessibility objectives include:

- How few people do I need to staff? Many times we make decisions with the end result in mind, and in contact centers this typically means how many people do I need to be successful – or how close can I cut it without missing the mark.
- What’s it going to cost me? Although most contact center leaders know the value provided to customers, it’s often a difficult thing to quantify. Without the value buy-in from other departments, the focus becomes cost, and contact center leaders are forced to think of service from a minimum expectation perspective.
- Meeting it is managing the contact center. With so much focus on accessibility metrics in a contact center, leaders often find themselves so consumed with the numbers that meeting them is what running a call center is all about.
- Some don’t even give us a chance. When setting metric expectations, many times centers begin to blame the customer for things like hanging up too quickly, and begin to adjust the excuses out of the metric.
- Zero abandons is an unrealistic expectation. Abandons are such a misunderstood result that we end up creating excuses and rationalizations when we see them on a report.

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While the accessibility objectives and their corresponding goals are often predetermined, contact center leaders can refocus their organization to gain a better connection between the accessibility goal and the customer. Doing this requires leaders to rethink everything they know about their accessibility metrics and look at what it really means to the people they are there to serve. Because the accessibility metrics have become so engrained into the day-to-day life in a center, it's often difficult to make this connection. The points below are from the customer's perspective and what accessibility objectives mean to them.

- Is the door open when promised? A service level or ASA objective is the price of admission – if you advertise your hours of operation, you're going to want to have the doors open at those times. Anytime there is a delay, it's the equivalent of making people stand outside waiting for admission.
- How much of my time are you willing to take? Your accessibility objectives really measure the amount of disrespect you're providing to a customer. When someone says they need service, every second that you make them wait is taking time away from their life.
- Should I begin to look for an alternative? Making people wait on hold in a contact center allows them to reconsider their relationship with the organization. And, with the fingertip alternatives available via the Internet, an extended hold time can result in a new opportunity for a competitor.
- I'm too busy right now. When people hang up, they are sending a message about what they've decided to do instead of waiting – and that is do something else. The message can be as simple as "I don't have tolerance for wasting time" or "I have alternatives." Either way, by hanging up once placed in queue sends a message -- one directly from the customer.

"The best contact centers spend less time managing queues and more time managing the customer experience." Tim Montgomery

While looking at your accessibility objectives through different glasses provides a nice perspective, it can leave some of the reasons open to interpretation. Key to getting everyone involved is to set some foundational standards associated with each objective that make it clear to everyone the importance to the customer and the contact center:

- It's the price of admission. You can not succeed in providing centralized contact center support without having the door open when promised. This is something that more customers openly talk about, and it can dramatically reduce the front line agent's job enjoyment. It's important to understand that it's not a goal – it's one of the reasons contact centers exist – to provide service when THEIR customers want it. Not getting this part right

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isn't an option and can't be viewed as a daily goal or measure – it's something that must be there, period.

- Impacts everything down the line. When you don't get it right, everything else down the line is impacted and the next customer will also suffer. It's a combination of a vicious cycle and domino effect – the first time you start to lose control, it begins to negatively impact the next one...and those customers who are negatively impacted call back and the entire frustration starts over again.
- Must be measured and “managed” by interval. Every customer has the same chance to receive the same level of service, regardless of when THEY choose to contact you. Remember, the customer is in charge. They contact you throughout the day, when they have a need. In every contact center, the workload needs to be managed and measured in every interval of every day – that's how the customer expects service.
- Impacts everything about the plan. If you don't get the accessibility measures managed as they relate to the customer's needs, all of the subsequent activities will suffer. Many contact centers get caught in a world focused on real-time management and recovery... and in most cases this is self inflicted. The key is to handle the customer's needs when they arrive -- if you don't, you lose control of all the subsequent events. This creates further challenges with accessibility down the line, and consequently drives up the contact center “chaos” factor.
- An early signal of customer frustration. If your customers are hanging up or have to wait, it's a bigger deal to them than it is to those running the department. Making the connection between your accessibility objectives and the customer means looking at the world through their eyes. If they're waiting a long time in line or self-selecting out of line, it means they're not happy. And it's historical -- meaning you could have already pushed them over the edge and they won't be coming back.
- Different based on customers and products. A one-size-fits-all approach to accessibility objectives is a mistake – not all customers are the same and your products provide different value. With that in mind, you should have as many accessibility targets as you do customer types and products supported. The customer's expectations are forever evolving, so you'll want to continuously revisit them as part of your planning process.

Revisiting Agent Quality and Productivity Objectives

Because we can measure just about everything in a contact center, we often do — and we also find ourselves converting things into metrics just because we need a way to balance the score card. As with accessibility objectives, quality and productivity are developed from the inside out to meet the organization's definition of quality and productivity. Even with the best intentions, these internally focused measures can make the environment a lot more challenging than it has to be. As we did with the accessibility objectives above, following are three views of agent quality and productivity – how companies traditionally view them, and two more effective ways.

“As you establish measures, track performance and work toward achieving important objectives, it is essential that your team understand what measures are really saying” Brad Cleveland, Call Center Management on Fast Forward

From the customer's perspective, it's pretty simple – do what you said were going to do and make it quick and accurate. Keep it simple for everyone involved and don't waste my time. The best service is that where the customer doesn't have to waste an ounce of energy being engaged in the process – they tell you what they want and you go do it. Sounds simple, but we often make it a lot harder than needed. Many times, the challenges are self-inflicted. Below are some examples of how companies tend to approach agent quality and productivity metrics:

- It's the resulting score on the monitoring form. Quality becomes a number that is an output of an internally designed monitoring form and internally designed point program. And, in a lot of companies, there are people whose job is to do nothing other than keep score against the forms, and quality becomes even more about the resulting numbers.
- Team and group comparisons of the score. When quality and productivity are focused on numbers, there are new ways to compare results. Companies are often proud of the group and team comparison displays and reports. In some cases, there is internal competition to be better than each other against the internally created metrics.
- Number of audits completed. A quota approach to the number of audits completed is something that exists in the majority of contact centers. Again with good intentions, but often at the expense of those that really need help in getting better. This approach moves more (and often unnecessary) audit attention to the agents that do a great job of providing wonderful service on a regular basis.
- How much time was focused on customer work? Trying to ensure people are busy through metrics leads to a focus on how much work they are doing. With measures like

this in place, centers are continually looking for the definition of “work” and tweaking the inputs to the calculation. As with quality, there are teams dedicated to tracking, trending and updating a number that most working in the center know has flaws.

- A way to reward and punish. These measures can be used as punishment or incentives; either way, they motivate a behavior in agents. In many cases the behavior that is being elicited isn't in the best interest of the customer, the agent or the organization. Rewards and punishment create fear – of looking bad or getting fired -- and result in agents focusing on things outside of their customer service mission.

As discussed earlier, customers are, for the most part, simple. And with that in mind, our quality and productivity measures, processes, reports and improvement initiatives should also be simple. It may sound strange, but making it simple is really easy. Just look at your world through the customer's eyes and make the connection with agent quality and productivity.

Start by reviewing the questions that customers ask, and see if they're addressed by your current agent measures and focus. Looking at the world from the customer's standpoint will immediately highlight the opportunities for your current productivity and quality metrics. In many cases, companies discover they've built too many internal perceptions into what is reported as an external view.

- Was it right and do I feel comfortable? This is the easiest of all – was the right solution provided and did the customer feel good at the end of the call. Sounds simple, and is. Something that should be included in every discussion on quality: Did you leave the customer feeling comfortable? This is easily assessed, but often overlooked.
- Do I feel valued? At the end of every interaction, the customer asks themselves if they moved forward with a feeling of value. This is easy – did you make them feel good about calling on their terms or did they hang up feeling like they cost you money?
- Did I get everything I needed? Well documented are the companies that don't get it and shortchange the customer...leaving them with a desire to contact you again to get the rest of the solution. When customers call back it's frustrating for everyone – particularly the customer.
- How much time was taken from me? In most cases, the customer looks at every interaction from their own time perspective. This isn't a bad thing and is something that every contact center must embrace. When customers are interacting with you, it's their time...and their life – be respectful from every angle.
- Did I feel rushed? You want to take as little of the customer's time as possible, but you don't want anyone to feel rushed and/or leave the transaction feeling like they were an inconvenience.

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- Was someone available when I wanted? You have to make the connection with productivity and the customer requirement. In real-time contact centers, the customer wants service when they choose. Adherence to schedule is a key indicator of how much you care about being there when the customer wants you to be.

“When people tell me they don’t have time for coaching, I say, ‘Spend ALL of your time on coaching — the rest will come easy.’” Herb Kelleher

Moving an organization closer to achieving admirable quality and productivity metrics starts with self-reflection. This is often the most painful part of change, and is the thing that can move contact centers to the next level. The alternative views described below are the enablers to change – those things that call center managers can ask their leaders to consider as they interact with their teams. These are simple statements with very powerful outcomes that have the ability to move organizations to the next level.

- Scores don’t change behaviors. Racking, stacking, ranking and displaying – none of these change an agent’s desire to improve. In many cases, a focus on the score makes people uncomfortable, leading them to focus on removing the discomfort by moving the results without considering the customer.
- Trends indicate opportunities. Outcomes are your view into the future, and the only way to make an informed decision is to understand the drivers to the trend. Key is to realize that the trend is driven by something...so the focus should be on something...not the resulting measure.
- The goal is to improve service, not manage agents. Often forgotten is the reason we have quality and adherence measures – it should be more about the customer than the service center. Many times the agent measures become the focus and call center agents and leaders lose sight of the connection with the customer. These are more than numbers, they are a key competitive advantage when fully understood and applied.
- Without the reality, the planning process is flawed. Something critical that is missed in most centers is that you MUST know the reality of the behavior to schedule effectively. Without this knowledge, the schedules will always be flawed and customer service will be a moving target. The key is to get your arms around the reality of the environment -- no goals, no desires, no targets; it’s all about what’s really happening.
- Numbers are merely indicators of opportunities to coach new behaviors. The best leaders don’t react based on a few metrics, they use them to identify trends and focus on behaviors that need to be addressed. When plotted over time, leaders find that most agent metrics are really noise and a natural variation in a process. It is critical to focus on

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the agent metrics that fall outside of what everyone else is doing – those are the real opportunities.

- All metrics and measures need to be flexible and change as often as the underlying process does. One thing is certain in a contact center – change. It is paramount to appreciate the external changes and the impact they have on the internal agent quality and productivity measures. Always keep in mind that if the inputs move the agent’s expectations, the inputs MUST change as often as the process that drives them.

“If you don’t know where you’re going, you will probably wind up somewhere else.” Dr. Laurence J. Peter

What the Best Companies Know

The best companies understand the following and apply it daily:

1. It’s all about the interval in advance – if you’re not doing it, you’re not taking full advantage of your contact center. And, if you’re not doing it, you’re most likely struggling to meet performance objectives and have frustrated agents and customers. The key is to keep it simple and look at things from a coverage gap perspective -- green is okay and red is bad.never let your center embark into an interval of red. Not only is this bad for customers, agents feel it and change their approach to service in subsequent intervals. Sounds harsh, but if you don’t have daily view of the agent need/gap similar to the one below, you are flying blind:

Week of Feb 1st		7:00 AM	7:15 AM	7:30 AM	7:45 AM	8:00 AM	8:15 AM	8:30 AM	8:45 AM	9:00 AM	9:15 AM	9:30 AM	9:45 AM	10:00 AM	10:15 AM	10:30 AM	10:45 AM	11:00 AM	11:15 AM	11:30 AM	11:45 AM	12:00 PM	12:15 PM	12:30 PM	12:45 PM	1:00 PM	1:15 PM	1:30 PM	1:45 PM
Monday		(3)	(3)	(6)	(6)	0	0	0	(3)	(3)	(3)	(1)	(4)	2	2	3	(5)	(5)	(5)	(6)	(6)	(1)	(1)	3	3	0	6	(1)	(2)
Tuesday		(2)	(2)	(5)	(5)	2	2	2	(1)	(1)	(1)	2	(1)	5	5	7	(1)	(1)	(1)	(2)	(2)	3	3	7	7	4	10	3	2
Wednesday		(1)	(1)	(3)	(3)	4	4	4	1	3	3	5	2	9	9	11	3	4	4	3	3	8	8	12	12	9	15	8	7
Thursday		(1)	(1)	(3)	(3)	4	4	4	1	4	4	7	4	11	11	13	5	6	6	5	5	9	9	14	14	10	16	10	9
Friday		(1)	(1)	(3)	(3)	4	4	4	1	4	4	7	4	11	11	13	5	6	6	5	5	9	9	14	14	10	16	10	9
		2:00 PM	2:15 PM	2:30 PM	2:45 PM	3:00 PM	3:15 PM	3:30 PM	3:45 PM	4:00 PM	4:15 PM	4:30 PM	4:45 PM	5:00 PM	5:15 PM	5:30 PM	5:45 PM	6:00 PM	6:15 PM	6:30 PM	6:45 PM	7:00 PM	7:15 PM	7:30 PM	7:45 PM	8:00 PM	8:15 PM	8:30 PM	8:45 PM
Monday		(4)	2	0	(1)	9	9	5	5	0	0	(2)	(2)	(3)	(1)	(1)	5	(3)	(3)	(3)	(3)	(1)	(1)	2	2	(3)	(3)	(2)	(2)
Tuesday		0	6	3	2	12	12	9	9	4	4	1	1	0	2	1	7	(1)	(1)	0	0	0	0	2	2	(3)	(3)	(2)	(2)
Wednesday		5	11	8	7	17	17	13	13	8	8	5	5	4	6	4	10	3	3	2	2	1	1	3	3	(2)	(2)	(2)	(2)
Thursday		6	12	9	8	19	19	15	15	9	9	6	6	6	8	5	11	4	4	3	3	0	0	2	2	(2)	(2)	(2)	(2)
Friday		6	12	9	8	19	19	15	15	9	9	6	6	6	8	5	11	4	4	3	3	1	1	3	3	(2)	(2)	(2)	(2)

2. Don't try to outsmart the reality. Queuing environments are real time, and when we apply service level objectives, the need to get to customers quickly becomes more of a challenge. The reality is that the 80/20 rule applies. This ISN'T service level -- it's the simple fact that when meeting a service level object, most of the calls will be handed immediately – in no time with no queue. So, if the frustration is the queue, and only 20% to 30% should even queue, why is so much focus placed on the queue? The best companies know that queues happen – the key is to understand and appreciate the queue and educate others on the potential impact and the reality.
3. The “power of one” in a contact center. Something that is known but hard to articulate is the way everyone in a center impacts the results of everyone else. And results include the workload of all, the customer experience, and the overall cost to service. Although many people will disagree, contact centers are essentially the same. Yes, some people focus on the difference as it relates to customers service or product supported, but the reality is that all centers are in the business of providing service when an external source (the customer) wants it. The need to service requires a focus on getting the customer served when THEY desire and ensuring that agents are available to meet the need. The impact of each individual is significant – if just one person doesn't do what was planned, the customer experience for all can be negatively impacted. The best contact centers don't dwell on the power of one to create fear; they use it to educate others and, more importantly, leverage it within their planning process.

“Put in a negative way, the aim of leadership is not merely to find and record failures of men, but to remove the causes of failure: to help people to do a better job with less effort.” Edward Deming

Help others connect the dots

As you know, if it can be measured, contact centers will find a way to measure it. The question is often what to measure. The answer is easy – it's the application that is hard. You have to relate all of your agent performance metrics to what each means to your customers. Focus on those things an agent can control and improve. If any of your agent performance metrics include something beyond the agent's direct influence, revisit those metrics. An easy rule of thumb: If you're not focusing your agents on quality and schedule adherence, you need to be. I've found that many contact center leaders will agree with this statement, but most don't fully appreciate the true impact these metrics have on everything that happens to their customers, their agents and their careers.

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Below is a visual display of how to gain a better understanding of the impact that quality and schedule adherence have on just about every critical element of your customers' experience.



In the middle is schedule adherence and quality. You can make the connection with the elements together or individually – the story is the same. For example, if your schedule adherence is lower than planned (i.e., agents aren't available when you planned for them to be available), your service level will be lower than planned during an interval. When this happens, everyone's workload is impacted because they're working harder. This leads to lower customer satisfaction, longer calls, forecast inaccuracy, additional staffing needs in subsequent intervals and, ultimately, lower quality. Agents become frustrated by customer dissatisfaction, get sloppy in providing necessary information, pass on time to customers to get breaks, leading to an increase in staffing needs to meet service level. Throwing bodies at the problem is often the remedy – hiring more people, cancelling necessary activities, moving leaders onto the phones, etc. With this approach, the root cause is never addressed and underlying problems will continue to escalate, ultimately resulting in higher agent turnover and lower customer satisfaction. This vicious cycle will continue until everyone realizes the importance of measuring and managing schedule adherence and quality.

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The question then becomes which should you focus on more – adherence or quality?. The answer? Both. What's more important is how you implement the focus and how it's perceived by the frontline staff. As discussed earlier, it should be less about a number and more about behavior. Your leadership team must have a conversation about improving a behavior without mentioning an actual numeric goal – no easy task. It starts with making an investment in the leaders and helping them fully understand the connection between the metrics, agent behaviors and customer satisfaction. Coaching in general isn't natural to most, and coaching without metrics is even more of a challenge. To positively move call center agents in the right direction and focus on the right things, a quality/adherence behavior-focused coaching program is a necessity.

Moving away from a metrics conversation is simple – get the agents involved in identifying their own “why” and “what”. For quality, focus on three things: 1) what was good about the call; 2) what could have been better; and 3) three things to work on (behaviors) before the next quality coaching session. This focus is done by the coach and by the agent – the agent identifies the behaviors to address and the actions are mutually agreed upon by the coach and agent.

Use the same approach with adherence: Without talking numbers, focus on the behaviors and agents' approach to their job – e.g., understanding of new policies, application of phone usage, external life events, etc. The object is to gain a better understanding of why there is an adherence challenge, and to get the agent to focus on the underlying behavior and develop action plans for improvement.

A key to making this transition is documenting the behavior agreements – the things agents will work on to improve. Just as important is the leader agreement – documenting the support that will be provided to help the agent improve. And there must be follow-through that includes regular coaching sessions that specifically focus on the plans with documentation of improvement and development. For agents that aren't successful in changing their behavior, this documentation is the catalyst for quickly finding a position (inside or outside of the company) where they'll be more successful. It's actually easier to move people with a behavior focus than with a metrics focus; with metrics, creative agents will always find a way to come in under the radar screen. Again, this is more work for leaders, but in the long run, it's better for the contact center as the bad apples are weeded out and the people that want to improve are given the proper attention.

“There is only one way under high Heaven to get anybody to do anything. Did you ever stop and think of that? Yes, just one way. And that is by making the other person want to do it. Remember, there is no other way.” Dale Carnegie

A Leader’s Next Steps

Leaders typically agree with the concepts, but often find difficulty in finding the starting point. This is actually the easy part. It starts with anyone who realizes the need to make a change. Many of you aren’t in a position to make the final decision and look for ways to get senior management engaged. Again, that starts with you. The best leaders know it takes creativity and hard work to convince upper management. Here are some ideas to help get leaders moving forward with making a transition from metrics to actions:

Start by making sure you’re armed with a complete understanding of contact center fundamentals and why a change in focus is important. Read about the basics of how centers operate. Even if you’ve been working in them for years, you’ll want to start over to ensure you’re saying the right things with confidence and in a way that will pique others’ interest. Keep in mind that running contact centers isn’t rocket science, and most of the pain is self-inflicted. By helping others realize the need to move back to the basics, you’ll engage them and inspire them to take a different look at metrics.

Take the time to walk through the experience from the customer’s perspective. Start with calling your own number and walking through the prompt options looking for quick wins. How quickly can you get to an agent? Do the options make sense to someone not familiar with the company? Are the voices the same?

Once you’ve made it easier to get to reps, move to the interaction and evaluate calls – not based on your internally developed quality form, but focused on what the customer is really telling you about their needs, your company’s ability to meet those needs, and how the customer really feels about interacting with you. You’ll find several examples that will help reinforce the need for change – and, you’ll be able to let others hear it directly from the customer.

Continually ask “why?” along with “why not?” – by doing this, you’ll have a clear understanding of the roadblocks hindering positive change in others. Focusing on the organizational barriers and looking beyond the conventional wisdom will highlight even more opportunities, as most companies have several processes in place without a clear understanding of how they started or why they exist. Your job is to get people outside of their comfort zone and to see the possibilities.

Pulling the Pieces Together

Moving metrics into action takes time and a commitment from all levels of the organization. You'll need to connect with external departments to ensure that they have an appreciation for a behavioral focused performance program that is more closely tied to what the customer has defined as a need vs. what the company has developed as measures of success. The best contact centers know that metrics are simply an indicator of opportunities, and that real positive change happens when leaders focus on the right behaviors that help the voice of your company get better.

About the Author



As a seasoned industry executive, popular speaker and highly regarded consultant, Tim Montgomery has guided thousands of contact center agents and leaders to improve individual and team performance, and exceed operational objectives. Drawing from these interactions and his extensive real-world experience, Tim founded The Service Level Group to help customer service centers leverage the competitive advantages they have right at their finger tips. Tim is part of an elite group of independent consultants who have earned a certified associate designation from the International Customer Management Institute (ICMI). He is also a professional member of the National Speakers Association (NSA).

Tim's firm grasp of real-world contact center solutions began with 14 years of hands-on operational experience. During his career, he held a variety of leadership positions – everything from Call Center Manager to Vice President of Sales and Operations. Tim's contact center leadership experience was fine-tuned by leading contact center and customer service operations for three of the most celebrated companies in the world – USAA, The Coca-Cola Company and The SCOOTER Store. Tim's professional career also includes active duty and reserve assignments in the United States Navy.

Prior to founding The Service Level Group, Tim was a Consultant, Seminar Leader and Technology Advisor for the International Customer Management Institute (ICMI). Tim's expertise in customer service and contact center operations has allowed him to lead a wide range of consulting engagements for companies in a variety of industries. His consulting clients have included some of the most recognized organizations in America – DELL, AIG, Lifetouch Publishing, ADP, Mitsubishi Motors, Farmers Insurance, Premera Blue Cross, Deluxe Corporation, SWBC, Allstate, Kodak, Liberty Mutual, Cinergy, Meguiar's, Home Properties, Amerigroup, Prime Therapeutics and many more.

Moving Metrics Into Action

Tim has written articles and whitepapers on a variety of management, customer service, and contact center topics. His work has been featured in many global publications, industry journals and position papers. He is also a contributing author to highly regarded books on Leadership and Business Management, Customer Relationship Management, Call Center Operations Management and People Management

Tim earned both his BBA in Accounting and MBA degrees from the University of Texas @ San Antonio and a Lean Six Sigma Certificate from Villanova University.

About Inova Solutions



Inova Solutions is a leading global provider of performance optimization solutions for the contact center, help desk and network operations center. Inova's products integrate data from existing systems to provide unified views of live and historical metrics across organizational levels for improved decision making and increased productivity. Superior technology, world-class services and support, and two decades of industry experience allows us to craft powerful solutions that deliver measurable results to a diverse customer base ranging from emerging growth to Fortune and Blue Chip companies. Learn more about Inova Solutions at www.inovasolutions.com.