In The Center with Rebecca Gibson

A Five-Step Performance Development Plan for Revving Up Call Quality

Agents are more likely to achieve performance targets when they understand exactly what is expected.

Clear, consistent standards are an essential component of a comprehensive performance management program. By accurately identifying and clearly explaining observable agent skills, you can create a framework in which all agents are aligned with performance targets.

While identifying the right performance standards may appear to be a simple task, gathering the required resources and clearly articulating the performance standards can be labor-intensive. Following is a five-step plan to help simplify the process.

1. Determine sources of input and feedback. First, decide who should be involved in identifying and maintaining your quality standards. Start with the call center management team responsible for creating and administering your monitoring program. But don't stop there –put together a crossfunctional team of individuals (agents, marketing, operations, training) who are invested in the success of the program and who can offer a variety of perspectives.

Review your organization's mission and values to ensure your standards support and reinforce a consistent message across all channels of communication. The call center culture, the sophistication of the workforce and the role of quantitative measurements all play a part in determining the right standards for your call center.

To create standards that reflect what your customers want, you may need to revise your current satisfaction surveying tool to gather specific data regarding customers' expectations. This data will help you to provide your agents with the tools to approach each interaction with the confidence to meet those expectations.

2. Identify your standards. The right quality measurements create a reasonable and valid set of standards that can be fairly applied to all interactions and to all agents.

Articulating standards that define a minimum level of acceptable performance while encouraging agents to continually evolve and improve their performance is a challenge. Also, to inspire newhires and veteran agents alike, you will need a combination of objective and subjective measurements.

There are two basic standards that encourage accuracy and consistency, while allowing for individual styles and variations in performance. These measurements – called *foundation* and *finesse* standards – provide your monitors with the means to accurately and realistically measure the quality of interactions. Following is a description of each standard (see box, below, for examples).

■ **Foundation standards.** Foundation or cornerstone standards are exactly what the name implies. These are the basic skills we expect agents to demonstrate during every customer interaction – regardless of their experience or level.

Examples of Performance Standards

FOUNDATION SKILLS

- Agent states his or her name during the greeting.
- Agent includes standard three-step conclusion in email.
- Agent must verify the name and subscriber ID number during every call.

FINESSE SKILLS

- Agent is professional and courteous.
- Agent offers complementary items or services.
- Agent shows empathy and compassion for the customer.

Foundation standards are easy to observe – they are measured by whether or not an agent demonstrated a particular skill (e.g., "agent stated his name during the greeting"). Foundation standards often address those skills that contribute to consistency and procedure completion, such as providing accurate information to the caller, or following the correct opening and closing steps. Typically, these are the skills that can be measured using black-and-white, quantitative standards ("skill was achieved" or "skill was not achieved").

Foundation standards are often preferred by managers and agents because they're so simple to measure and leave no room for judgments, which can be challenged. Disputes are easily resolved by listening to call recordings (either the agent completed the task or didn't).

However, this approach can be problematic because it doesn't allow for variations in skill level or incremental performance improvements.

Although foundation standards can encourage performance consistency and efficiency, they don't inspire agents to use the more subjective skills that have a more positive effect on the overall interaction. Agents who skillfully handle interactions with "finesse" can create a "wow" experience for customers.

■ **Finesse standards.** These standards address the human interaction element of customer service. They're typically referred to as "soft skills" (i.e., listening skills, handling difficult callers, demonstrating empathy).

Unlike foundation standards, which measure whether or not a skill was demonstrated, finesse standards measure the quality of the skill or *how* it was demonstrated. It uses performance ranges to encourage continual and incremental performance improvement.

Finesse skills are measured using a graduated scoring method, which re-

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flects the range of acceptable performance (e.g., 1 = needs improvement, 2 = achieves skill satisfactorily, 3 = exceeds skill expectation). With proper coaching, agents can see improvements in specific skills (moving through the range from 1 to 3), which motivates them toward continued performance improvement. On the other hand, if soft skills were measured using a yes/no scale, agents would be rated by whether or not they attempted the skill, not how well they performed it. That would also restrict opportunities to offer ongoing coaching to achieve higher levels of skills.

When trying to find the right mix of foundation and finesse standards for your particular call center, try not to emphasize one over over the other. A balanced combination of standards clearly defines and models the desired behaviors while leaving breathing room for agents to reveal their personalities and provide a meaningful human interaction. While foundation skills provide the basis for consistency and accuracy, finesse skills allow for a customer experience that goes beyond the basic expectations and provide agents with the opportunity to stretch and improve.

3. Document, document, document. Once your performance standards are identified, adequate supporting documentation is essential. It must be comprehensive, clear and concise.

For each skill listed on the monitoring form, start with a brief statement that describes the skill (see "Sample Performance Standard Documentation" above). Next, explain the purpose of each standard (i.e., why is it important that we do this?). Then further define the standard by offering clear guidelines on how variations of skill level will be reflected in scores along with examples or sample verbiage of how this skills is demonstrated.

4. Communicate (and celebrate). Make sure everyone in the organization has a common understanding of what constitutes a quality interaction and how it is demonstrated.

To get companywide buy-in, publicize your approach by creating a positive "buzz." The most effective way to do this is to tie performance standard targets to organizational and call center objectives. If you can "sell" the standards as the surest route to improved efficiency, higher customer satisfaction and increased revenue, you're more likely to see energy and resources devoted to helping agents reach those targets.

5. Review for relevancy. Review the standards on an ongoing basis for relevancy and changing priorities. Pay attention to evolving customer expectations and changing call center and organizational requirements. Regular monitoring calibration is essential to ensure a common understanding of how behaviors are demonstrated and to check for unclearly defined or invalid standards.

Sample Performance Standard Documentation

Skill	Overcoming objections to gain the customer's commitment.
Purpose	To increase customers' positive perception of their experiences by sensitively addressing their objections and concerns about proposed solutions and persuasively gaining their commitment.
Definitions and Guidelines	To receive a 1 rating, the agent fails to handle or ineffectively responds to the customer's objections. *Example:* The customer expresses doubts about the effectiveness of a solution offered. The agent encourages him or her to try the solution, but does not address the customer's concerns. To receive a 2 rating, the agent addresses common concerns using the appropriate scripted response in the call guide. *Example:* The agent makes a reasonable effort to persuade the customer to commit to the proposed solution and does not ignore the customer's protests or concerns. To receive a 3 rating, the agent creatively and persuasively addresses the customer's objections, going beyond the scripted responses. *Example:* The agent tailors his or her responses to speak to the customer's specific situation and needs, and gains a strong customer commitment to the proposed solution. N/A: This skill may be rated "not applicable" if there are no customer objections and/or there is no solution for which the customer's commitment is required.

Ensuring a 'Wow' Experience

Accurately identifying and defining the right performance standards for your agents may seem to be a painstaking process, but it provides your call center with a substantial return on investment.

Creating standards that reflect the organization's overarching mission encourages a consistent message and approach as customers come in contact with the organization through various channels. Merck Pharmaceutical, for instance, identifies "honesty and integrity" as values that embody their corporate mission "to preserve and improve human life." Merck's call center performance standards define how agents can be honest and truthful during customer interactions to create the opportunity for the organization to demonstrate their commitment to their mission.

Call standards are the basis for all performance management and has a positive effect on the results an agent achieves. A balanced approach helps agents to recognize the components of their individual contribution to overall customer satisfaction and call center effectiveness.

Performance standards not only communicate the call center's priorities and expectations to agents, and they offer agents a map to guide customers to a "wow" experience. CCMReview

Rebecca Gibson will lead a three-part, Web-based seminar series on call monitoring on July 16, July 23 and August 13, from 1 p.m. to 3 p.m. (EST). For more information or to register, please visit www.incoming.com or call ICMI at 800-672-6177 or 410-267-0700.

Rebecca Gibson

Rebecca Gibson is a Certified Associate and Manager of Educational Services for Incoming Calls Management Institute. She can be reached at 410-267-0700, ext. 227, or rebeccag@incoming.com.

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