

How to Exceed Your Contact Center's Annual Financial Goals Part 1 of 3

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I recently had an opportunity to interview Hilde Betts, SVP in charge of the Harris, N.A. contact center operation...and a longtime client of Ulysses Learning, a leading sales, service and coaching training company based outside of Charlotte, North Carolina. Harris, N.A. is a Chicago-based financial services group with \$38.3 billion in assets (its parent company is BMO Financial Group with \$282 billion in assets).

Earlier in the year the Harris contact center team was named the 2006 Center of Excellence – which was awarded to them based on their performance in 2005 in which they were rated #1 against 17 other large, U.S. financial services companies. When I connected with Hilde, the Harris contact center team had already exceeded every one of their 2006 financial goals by wide margins...and the year had not yet ended.

How did Harris achieve this level of contact center success? I had to learn more and thought TMCnet.com readers would be intrigued as well. What follows is the first in a three-part series of articles featuring my interview with the woman at the helm of the Harris Contact Center operation – Ms. Hilde Betts.

OD: Congratulations on your contact center's success this year. So what's your secret?

Betts: There's no secret. Our folks have done really well. As a team, we were asked to make some tremendous changes. We were asked to focus more on bottom-line sales growth while keeping our customer satisfaction levels high. We trusted each other, we trusted the process and we worked hard. I'm enormously proud of our group.

OD: We all know that the path to success starts with a clear vision of what can be? As a contact center leader, how would you describe your guiding vision?

Betts: I view our contact center to be a gold mine because we have the most frequent contact with our company's clients, and, as such, I believe we have a tremendous responsibility to deliver the organization's brand promise.

I also believe we have great opportunities to build relationships because we interact with clients so frequently. Now, as we all know, relationships can be deepened in a number of ways. Taking care of whatever the client's needs are at the moment is always first and foremost. But I believe another important part of providing good service to our clients is to take another step and ask "Is Harris doing everything we can to help you achieve your financial goals?"

OD: So the sales component is important?

Betts: I don't see this as a sales component, per se, or being something separate from service. I see this as being a part of the relationship building interaction. It's a very low-key question. It isn't high pressure sales. What it allows is for the client to come back with "I'm okay, I'm all set." or "You know, I was actually thinking about checking out a home equity loan..." Our "guiding vision" is to be helpful, to discover what the client needs and to ensure that we are taking care of those needs.

OD: I've been working with financial services contact centers for years and it is very tough making that "service to sales" transition. How did your center do it?

Betts: There were a number of factors. We had a multi-layered approach mapped out to help us achieve our business objectives, which included training and ongoing performance improvement initiatives. But before we could do any of that we needed to focus on something very intangible; we needed to help bring about a "mind set shift" for our entire staff. We called these activities "will-building" activities to differentiate them from the training or "skill-building" activities.

OD: So your focus was to first help build the "will" or desire for your team to embrace the vision to be more proactive in their client interactions. How was that accomplished?

Betts: There were two activities which I thought had the greatest impact. First, we asked the question "Do we have people who are fitting the role?" So we designed a "fit to role" assessment, which everyone took. It helped us get a better view of how closely each team member is fitting their role. And, of course, it helped us identify gaps in terms of behaviors and skills that needed to be developed.

Running parallel to this initiative was a body of work that focused on identifying high performers and the behaviors of these high performers. We ended up creating a "high performer template" which was very helpful in identifying what performance gaps needed to be closed for those team members who had poor "fit to role" assessments.

If someone's skills and behaviors were not a good fit to role with the job they were in and they weren't willing to close the gap, we connected them with other opportunities within the company. But we didn't want to "hire in" the same skill and mind set again.

OD: That had to have been an interesting learning process. Did you have any surprises along the way?

Betts: We certainly learned a lot. One thing that changed was our new hire process. Interestingly, we learned that what made a high performer was more around the behaviors they possessed and less around their skill set or past experience. So now we're looking for key behaviors in our candidates. We also are very clear in articulating what the job will entail and what role the new hire will play in our organization.

We also learned that most managers are not the best interviewers of new job candidates. We established a "peer council" of high performers who interview every single candidate coming in. Only candidates who make it through this screen will speak with a manager.

What we found is that because candidates are more comfortable speaking with their peers, we get greater insights into what motivates the person, and we're making better hiring decisions. We also found that by giving the peer council the authority, responsibility and accountability to bring in top talent they are further motivated to perform and contribute to our team concept.

In *Part Two* of this three-part series, Hilde Betts discusses the work Harris has done and continues to do with its training and performance improvement partner, Ulysses Learning. Learn how Harris solidified their "mind set shift" to be more proactive in helping clients by asking the right questions and offering solutions of value, which contributed greatly to Harris' record breaking business performance in 2006. Coaching practices to sustain and further improve performance will also be highlighted.

To speak with a Ulysses Learning consultant, contact the company at 800.662.4066 or via e-Mail at info@ulysseslearning.com. You can also visit Ulysses on the web at www.ulysseslearning.com.