

How to Exceed Your Contact Center's Annual Financial Goals Part 2 of 3

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This is the second in a series of three articles focusing on the success of the contact center team at Harris, N.A., a Chicago-based financial services provider (\$38.3 billion in assets and part of the BMO Financial Group with \$282 billion in assets). The Harris contact center exceeded all its 2006 performance goals early in the fourth quarter using a well conceived and executed performance improvement plan built on a solid foundation of trust. Also in 2006, the Harris team received industry recognition when they were named the "2006 Center of Excellence" in which they were rated #1 against 17 other large, U.S. financial services companies.

It's not every day that you hear of a contact center that set the bar high for the year and then managed to exceed *all* their performance goals by "fantastic" margins *before* the onset of autumn...yet that's exactly what the Harris, N.A. contact center team did.

In an interview with Hilde Betts, SVP in charge of the Harris, N.A. contact center operation...and longtime client of Ulysses Learning, a leading sales, service and coaching training company based outside of Charlotte, North Carolina, I had a chance to get behind the performance results to learn what differentiates this center from others. What I learned is this – for the Harris contact center team, success comes from a unique combination of "will building" strategies (article #1), as well as skill building and ongoing performance improvement strategies.

OD: You did a tremendous amount of work with your team to help shift their mind sets and embrace the organization's vision to be more proactive in their client interactions. How did you solidify that work?

Betts: Obviously, training is a big focus. We've been working with Ulysses Learning for a number of years. We really consider them partners in our success and feel they do a great job tailoring training to fit our needs.

OD: I understand you rolled out two of Ulysses' **CallMentorLearning and Performance Improvement System** training programs – **ServiceMentorService to Sales** as well as **CoachingMentor** – is that right?

Betts: Yes. I think both are outstanding programs. They go hand in hand with one another – **ServiceMentorService to Sales** is for everyone in the center at all levels and **CoachingMentor** is for all levels of managers and supervisors.

Coaching really is an important focus for us. The entire leadership team, including myself, went through the **CoachingMentor** training. The simulations and group exercises in the training provide us plenty of opportunities to practice and perfect our coaching strategies and conversations.

I can't say enough how important coaching is to our contact center. Our folks needed to see us walk the talk – we were the role models for performance improvement coaching. I believe this was a key to our success in making the mindset shift, along with Master Coach Certification, which is another area in which Ulysses helps us.

OD: I think most contact center executives reading this article would agree that *real* "performance improvement" coaching is very difficult to do, day in and day out. I hear that lack of time and, quite frankly, *comfort* in initiating what can be "touchy" conversations with agents are a couple of the top reasons coaching falls on the priority list. How did you address these concerns?

Betts: We didn't want our team members to be afraid of being coached by their own or other managers in our center so we focused first on implementing a routine with which they'd be comfortable.

Initially, our coaching conversations centered on discovering "wonderful nuggets" or compliments on an aspect of the agent's performance during a call. We also gave chocolates along with these compliments that said "Thank you for doing such a great job with our clients."

After we had done 200-300 of these sessions, we felt we were ready for the next stage, which was to have agents listen to their own calls with us and then provide feedback on what they heard. Oftentimes they immediately identified what they could do differently.

We found that our agents were much more critical than the coaches would ever be. There were many times we had to tell our folks that their calls weren't as bad as they thought! And we were quick to point out what they did well and then agreed on the one behavior that they'd want to work on, which is part of the coaching strategy we learned in the **CoachingMentor** training.

We wanted coaching to be a collaborative effort and it now is. In the beginning there was a lot of concern around how people would receive feedback or how the process was going to work. Now the process is in place and they can't wait for the feedback!

OD: Are you doing anything special to keep the coaching momentum going?

Betts: There is a lot of excitement in our contact center. Agents come up to me and say "you have to hear this WOW call" or "I just had the greatest call!" This gave us the idea to have a contest around "great calls" so the agents could share their stories.

We keep it simple. Agents submit their great calls and we review them. We also recognize and compliment all agents who submit great calls at our "all employees" meetings. Plus, we'll select a couple of the great calls to share with the group. We also share customer compliments at these meetings and give recognition to those individuals commended by our clients. I believe in recognizing folks in front of all team members.

We also created other individual contests as well as team contests with different themes and durations. Agents really have fun with these; the competitive spirit certainly comes through!

I have a funny story for you to illustrate this point. You see, everyone has their name on a board somewhere in the contact center, highlighting their goals and performance stats. The agents actually update their own boards.

One day, our new CEO came in and asked "What are all these boards?" While I was telling her that they were each of our agent's performance results, I had a couple of agents come up to us and say "Don't look at that board yet, let me update my results!"

OD: Your CEO had to be pretty impressed! So it sounds like the culture has taken hold?

Betts: It has. I have to tell you though, given the enormous change we under took, we were concerned that we were going to hear some unfavorable responses on our annual employee opinion survey. The timing of the survey was right after we rolled out our performance goals, outlined our whole program, and started the training and coaching.

But our survey results were good and actually improved from the previous year when our employee opinion rating was one of the best in whole company. Again, I am so proud of our team – our agents, supervisors, and managers...everyone, including our partners at Ulysses. When I think about what we accomplished this past year - exceeding all of our 2006 financial goals by wide margins - it does build confidence for 2007!

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.