

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

By Cheryl O'Donoghue (odonoghue@ameritech.net)

This article is the last in a series of three 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). In the first two articles, we explored the "will building" and "skill building" strategies Harris implemented to instill a high-performance culture built on trust. To read these previous articles, visit <http://www.tmcnet.com/channels/call-center-training>.

There's a popular expression that says "it's the journey that matters most, not the destination". So, what do you do if your contact center reached its destination in 2006, shattering all performance goals long before year-end and earning top industry recognition as the "2006 Center of Excellence"? If you're the Harris contact center team, you build upon your success, look for ways to improve further, create a *new* destination for 2007...and begin another exciting journey.

Here's the last part of my interview with Hilde Betts, SVP in charge of the Harris, N.A. contact center and client of Ulysses Learning. Ulysses is a leading sales, service and coaching training company and a partner with Harris in implementing many of the performance improvement initiatives discussed in this article series.

OD: Okay, 2006 is under your belt and you can put another one in the "win" column. If you had to sum up the year in a few words what would you say and why?

Betts: I'd say it was a "confidence builder". We were asked to achieve huge financial goals in 2006 and we knew that to accomplish these goals we needed to *all* undertake enormous change...and we did it.

But people were concerned at first that they *couldn't* do it. So we provided them the tools and support they needed. This helped bring about a mindset shift which I feel was the key to achieving our goals. If you believe it will happen...it will.

In the beginning of 2006 when we were putting all the pieces together, we had a "Yes we can" campaign which we adapted from a company campaign called "Yes we can grow revenue together". As the year went on, this changed to a "Yes we *will*" campaign and we ended the year with a "Yes we *did*" celebration.

Our team members put this campaign together. We *all* own our success and we know what it takes to have another successful year.

OD: So you proved the theory that if you can visualize the success you want to achieve and experience how it feels to achieve it before it actually happens, you will ultimately achieve your goal. Did you have any surprises along the way?

Betts: Well, it wasn't a surprise as much as it was a realization. There was a point in the year when our people truly realized that they will meet their goals because they *support* each other. The team felt pressure to *not* let any of the members fail.

For example, our folks coach their peers regularly. If there's someone who's not yet up to the level of the team, overall, we'll have members from that team come in on

their day off to help raise their team member's performance. There's an agreement among the team that they're all going to work together to meet their goal.

OD: Well, there's a new twist! Obviously that approach works since you achieved your financial goals long before year-end. Did anyone have a hard time?

Betts: Sure, we had some folks who couldn't get on board. After they went through the training and coaching, they found they were still struggling with their mindset shift.

Let me give you an example. Let's say a team member didn't want to talk about mortgages to a potential new home buyer because they thought our rates weren't the lowest. We'd have a direct conversation with them around key points such as: "Rates are only one part of the equation, the quality of service we provide is also a consideration" and "You can't be selective about the parts of the job you want to do. If you really don't think that the company is doing things right for our clients, then maybe this is not the team to play on."

Those direct conversations helped. Come to think of it, there was a surprise in this process. In situations like the one I just described, the team would do everything they could to raise each other's performance, but once an individual decided that they were *not* going to perform, the team would actually encourage that person that it was time to leave. Most times the team made the decision before management got involved. We found the team dynamic to be incredibly powerful and it created a much healthier approach to deal with team members who can potentially "poison" the performance of the rest of the group.

OD: So it's a new year. What do you plan to take from 2006 to keep the momentum going in 2007?

Betts: I believe we have the right pieces in place, so we will continue to do much of the same. We will all continue to coach regularly, including peer coaching. That's become a very acceptable way to improve performance. People regularly ask their peer coaches to help them with a particular challenge.

We also will continue with group coaching and calibration. We have brown-bag lunches where folks get together to listen to how they've handled particular calls or coaching interactions and they ask the group for feedback. We have entire business groups doing this. It's become a standard part of our coaching process. People want to be competitive and successful...they don't want to fail. They trust one another's help.

OD: Is there anything that you'll change?

Betts: We always seek to be better. I have "Shadow Cabinet" meetings with my folks. I randomly select a group of employees to have lunch with me. I ask them for feedback on my own performance or what we could do differently or better. It's not a complaining session; it's very constructive.

There has been a rich body of work that has and continues to come from these meetings. Personally, I find it gives me more insights into people and what they're thinking, which makes me a better leader for them. For the team, it provides yet another forum to get their ideas heard.

Just recently the group was talking about different ways to change our contests. They asked if I'd be open to various ideas. I told them that as long as it's fair, ethical and legal, they've got my support. We have a quite creative team!

OD: So what do your financial goals look like for 2007?

Betts: They're huge again and we've risen to the challenge! What's most important is that we're going into 2007 with a great deal of confidence and clarity around our goals. Our team understands how our goals and priorities relate to the company's, overall. We chunk them out by group, by team and by individual. Everyone sees our performance goals by layer, mine included, so they can see how they all connect.

We also have focused conversations around what levers we need to push to drive towards our goals. People need to know why we have chosen one priority over another and how it contributes to our 2007 plan.

OD: Any final thoughts?

Betts: We're going into this New Year with two core beliefs: first, many of the right things are in place, and second, there is always room for improvement. We will remain open and listen to any and all ideas and if we implement an idea that doesn't turn out the way we intended, we'll try something new. As a team, we'll continue to build a high-performance culture that's built on trust. With our trust in each other, I know we can accomplish anything.

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.