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## Improving the Effectiveness of Call Monitoring –

*It's More Intuitive Than You Think!*

# Improving the Effectiveness of Call Monitoring — It's More Intuitive Than You Think!

BY DINA VANCE

If your call center is like most, your organization spends tremendous amounts of time, effort and money on call recording and monitoring for quality assurance. However, if you wonder how best to use that information to change performance at the point of contact and create a better customer experience, you're not alone.

In a recent study, SQM Group found 95 percent of call centers have a formal call monitoring program and on average monitor six calls per representatives per month. That statistic is impressive because seven years ago, less than 50 percent of call centers deployed effective call monitoring programs.

However, SQM also found that although the call center industry has formalized the call monitoring process, it has had little or no impact on customer satisfaction and first call resolution (FCR). In fact, the study showed that only 20 percent of call monitoring that is conducted impacts customer satisfaction ratings and only 17 percent of representative call monitoring ratings actually impact FCR — significantly less than anticipated based on the investment in these technologies.

So why do call centers continue to invest in monitoring? The answer is simple. It's not the monitoring itself, but the information that can be gleaned from it. This information can be communicated to the frontline, impact performance and ultimately improve the customer experience.

How can you improve the monitoring process, and more important, translate that into more effective customer service and higher levels of FCR?

## Why Call Monitoring Hasn't Been Successful

At most organizations, call monitoring is a very literal process. Quality assurance (QA) departments monitor for the presence or absence of certain behaviors. They tend to listen for specific statements or words to see if they exist. For example, a behavior often looked for in monitoring is the use of an "I can" statement for every call. The literal interpretation of this behavior is to listen for the actual words "I can" versus the intuitive interpretation of this behavior which takes control and ownership of the call. The actual words could be "absolutely," "I would be glad to" or "my pleasure to help."

In short, having a representative interpret the process or model literally won't effectively drive a positive customer experience. This is one of the underlying factors behind SQM's findings. The key to improving your monitoring results is to focus on the rep's and evaluator's intuitive interpretation of the customer experience versus focusing on a strictly literal account of the words used and call flow.

## Coaching is the Key

The only way to make the investment in call monitoring pay off is through coaching and development for both reps and QA evaluators.

Monitoring without coaching is like walking blindfolded in the dark. You'll reach an end point, but the likelihood of achieving the results you want is slim. To see if your current coaching process is working, ask your reps, "What are you doing differently as a result of your last coaching interaction?" The answers will tell you if your quality process is on target and more important, if the critical information gleaned from the monitoring process is reaching the frontline and changing performance.

Last year, Ulysses Learning evaluated more than 50 call centers to see if their monitoring and coaching process was motivating reps to achieve new levels of performance and creating a better customer experience. Less than 20 percent of the organizations were achieving this goal on a consistent basis. The findings showed that most organizations implement coaching processes on an as-needed basis without consistency and often vacillate between the literal and intuitive interpretation of the behavior. To be successful in 2008, call centers need to coach intuitive behaviors in a focused, prescriptive and consistent way — no matter what time, resource or daily fires arise.

## How to Coach Effectively

Once you've monitored and recorded your representatives' calls and analyzed that information, you then need to take action. You can't expect agent performance to improve simply because they are being monitored. The best way to improve performance is through coaching.

In order for coaching to work, it needs to be focused and timely. Organizations that employ effective coaching follow four basic principles, as follows:



- Provide timely coaching within a reasonable time after the call
- Focus on one pivotal behavior to ensure the greatest impact
- Provide constructive and focused feedback
- Provide the feedback consistently with dependable follow-up.

Another important element is consistency. Everyone at the call center who coaches performance needs to follow the same coaching process. The coach should give feedback that is specific and targeted based around the behavior that will provide the greatest impact on the outcome of the call. By focusing on a single behavior, the coach won't overwhelm the representative with too many things to change at once. And by doing it in a constructive way, the rep will be more likely to accept and apply that feedback.

Here is an example of coaching that isn't effective, along with a way to improve it. If a coach was monitoring a call where the rep missed a sales referral opportunity, an untrained coach might say, "You missed the opportunity to sell the customer an additional service." The downside of this type of a statement is that it doesn't offer a better, alternative solution or tie the impact of the rep's behavior to the outcome of the call.

Instead, the coach should focus on where the rep missed the opportunity, which is the pivotal behavior. The coach could say, "I'd like to share an idea that has helped others improve sales by build-

ing a product need from what customers say in the conversation. The customer said their son is applying to college and they are worried about how to pay for it. When hearing the clue that the son is going away to school, it suggests that the customer might need a school loan or line of credit. By not picking up on this, we weren't able to offer the customer valuable choices."

Then, the coach can offer a specific suggestion for future calls by saying, "Next time, when you hear this clue, ask a question such as 'You mentioned your son is going to college and you are worried about how to pay for it. May I share some alternatives that other parents have found helpful to fund their children's education?' As you focus on these types of clues, you'll find it will help you pose the questions that best address the customer's needs. Give it a try. I'll check back with you tomorrow to see how this suggestion worked for you and answer any other questions you might have."

With this constructive, interactive process, the representative would walk away from the coaching session with an understanding of how to better manage a specific situation – and ultimately improve the customer experience in future calls.

### **Using Coaching and Training to Improve Sound Judgment and Customer Service Skills**

As a result of recent monitoring, many call centers are reporting that representatives are missing sound judgment and decision-making skills – two crucial skills

associated with improving the customer experience.

In order to make intuitive decisions, reps should take control of the call, focus on the customer, get to the root of the issue, come up with an appropriate solution and solve the issue. Giving them latitude to use their intuition and judgment, rather than forcing them to use an "I can" statement, increases their rate of first call resolution and improves customer satisfaction. Plus, the reps get to the essence of the customer issue more quickly, increasing their productivity.

### **Improving Skills Through Simulation-based e-Learning**

The best way for representatives to learn these intuitive judgment and customer service skills is by doing, but not at the risk of having them practice on actual customers.

Instead, simulation-based e-Learning allows individuals to learn in a safe environment, make mistakes, get feedback, learn the impact of their effective or ineffective use of the skills and then try again. By using this learning method, they can develop both the skills and confidence needed to deliver consistent quality service without jeopardizing valuable customer relationships.

### **Making the Most of Your Monitoring Data**

Bringing the entire process back full circle, once you've made changes to the coaching process, it's time to address the data obtained from call monitoring. Organizations need to examine the information to track trends at a team and company level, not just at the individual level. Doing so on all three levels lets you look for trends around learning opportunities and customer experiences.

To stay competitive in 2008, organizations need to first take a broader look at monitoring data. Then, they need to communicate the feedback, provide development where needed, stay focused on coaching and continually analyze the data for ongoing improvement.

If organizations can improve the entire customer experience by empowering reps to make better decisions and reward them by evaluating them qualitatively, they'll prove the prevailing research wrong – and most important, find that call monitoring definitely makes sense. **CP**

**About the author:** Dina Vance (dvance@ulysseslearning.com; 704.943.5800), Senior Vice President of Ulysses Learning, is a widely respected thought leader on developing and leading contact center staff and a pioneer in improving performance of contact centers. Ms. Vance was responsible for the ground-level start up of two contact centers before managing the call center division for an international consulting and training organization. She has worked with Fortune 100 companies to optimize their call center performance through focus on results, people and process. She has served on the executive and advisory board of the Call Center Industry Advisory Council (CIAC), American Bankers Association (ABA), and *Contact Professional* magazine.

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## The Ulysses Learning Story...

A Greek shipping magnate who was passionate about training, education and technology wanted to invest in and advance the future of corporate learning. So in 1995 he formed a new company – Ulysses Learning – and, in the spirit of the epic Greek poem, our own “odyssey” began.

The first step on the journey was to select the best, most experienced senior executives to navigate our course and charge them with a unique mission to search industry wide to:

1. identify the areas of business that could benefit most from developing human performance through technology-enabled training and related services;
2. uncover the toughest barriers to improvement; and
3. assemble a world-class team of experts to develop the best combination of training solutions to achieve and sustain demonstrable performance results.

Thanks to Ulysses’ blue-chip team - top business professionals, thought leaders, and consultants; performance improvement and training experts; cognitive scientists; and industrial/organizational psychologists – we have accomplished this mission.

Our research identified contact centers as an opportune place to begin developing frontline judgment and customer interaction skills. These two critical elements, when developed effectively, improve service, sales and coaching performance and achieve higher levels of revenue and customer loyalty results.

To that end, we developed the **CallMentor®** Learning and Performance Improvement System - simulation-based e-Learning intelligently blended with facilitation, coaching and performance improvement consulting.

Today, **CallMentor** is the contact center industry’s most recognized training solution, winning 10 consecutive Product of the Year Awards, among other industry distinctions and honors.

Ulysses has grown to be an international learning and performance improvement company serving industry leaders committed to improving their sales, service and customer loyalty at all points of customer contact. And, as our “Ulysses” name implies, we continue our journey with our clients to seek and develop the best possible combination of performance improvement methods and processes that produce measurable results and sustain the test of time.



### Learn more...

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