

Meeting corporate expectations – and improving customer experience – through better training and coaching

The Challenge

Established in 1817 and based in Canada, BMO Financial Group serves more than 10 million personal, commercial, corporate and institutional customers in North America and internationally. Customer satisfaction and loyalty are the cornerstones of the Bank of Montreal. The bank's mission is to continuously and rigorously define new levels

of customer service and excellence. To meet that corporate objective, BMO's call center, known as Direct Bank, was looking to launch a skills-based training program to deliver the desired client experience and achieve incremental closes. Plus, it wanted to enhance its coaching program to do so.

“The results were impressive. We noted positive trends in increased employee commitment and confidence, behavioral change, improved SQL, improved problem resolution and increased referrals.”
– Lynne Creighton, Vice President of Direct Bank, BMO's call center.

The Solution

Direct Bank's leadership team began looking for a solution to meet its corporate objectives. They chose Ulysses Learning because of the strength of Ulysses' *CoachingMentor* and *ServiceMentor* programs, backed by its dynamic, simulated scenarios that have been validated by more than 70,000 actual customer calls. BMO was drawn to Ulysses' approach that combined online, role-playing simulations with facilitator-led learning and coaching, along with the fact that it is easy to deploy from a technology standpoint.

To help agents develop – and then reinforce – the crucial customer service skills they need, Ulysses Learning worked with Creighton's team in multiple ways. This included:

- Providing a safe, simulated environment to learn and practice. This allows agents to try out new skills in a realistic, yet safe environment where they can make mistakes in private and learn from those mistakes.
- Enabling agents to articulate their responses. By saying the responses out loud, recording them and playing them back, agents were able to develop and practice their own “scripts” for handling different customer interactions, enhancing their confidence levels.

- Accommodating different learning styles. Ulysses takes individual learning styles into consideration. Some employees chose to tackle the simulations right away, while others read or listened to audio files first.
- Tailoring learning to different levels of expertise. Based on their skill level, agents can take different paths.

Another area that the Ulysses Learning helped BMO develop was coaching.

“Many managers found conducting one-on-ones with all employees on a consistent basis to be quite a challenge, especially from a time standpoint since they did not have specific training on providing quick, immediate and concise feedback,” said Creighton.

To improve coaching's effectiveness, the Ulysses team showed BMO's managers how to improve their coaching by providing timely, focused feedback in smaller segments following a call observation.

Results

- The division received more customer compliments in the three-month period following the training than they had in the previous two years
- Employees were acting calmer, taking control of the calls, showing improved confidence and handling the calls more effectively
- Service Quality Index (SQI) increased
- Employee commitment and confidence increased

Since 1995, Ulysses Learning has helped organizations of all sizes improve their customer service, sales and coaching performance. Using online, role playing simulations, Ulysses helps build decision making and advanced interaction skills in contact centers and at all points of customer interaction through the organization. We spent four years in research and development to create the validated content and proven methods to help companies effectively train their front line, engage their leaders and ultimately boost their customer base.

Our simulations deal directly with the different type of emotions and challenges that customer service agents face today.

For more information how Ulysses Learning can help your contact center and leadership thrive, call 800.662.4066, e-mail info@ulysseslearning.com or visit www.ulysseslearning.com