



How to *really* walk in your customer's shoes

The missing ingredient for QA

Miriam Nelson, Ph.D.

*SVP, Call Center
Performance*

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AON CONSULTING

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Our Approach to Call Centers

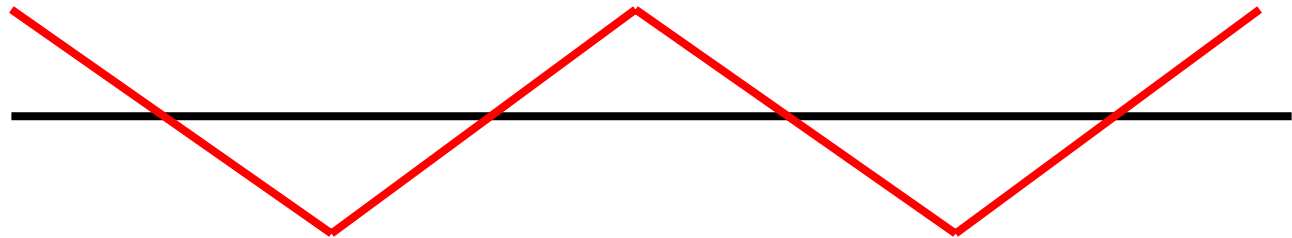


Walking in your customer's shoes

Your Take-Away:

Re-evaluate your QA process from the perspective of the customer

Human side



Business side

Every discussion of QA should *start* with goals...

What are the goals of your service encounters?



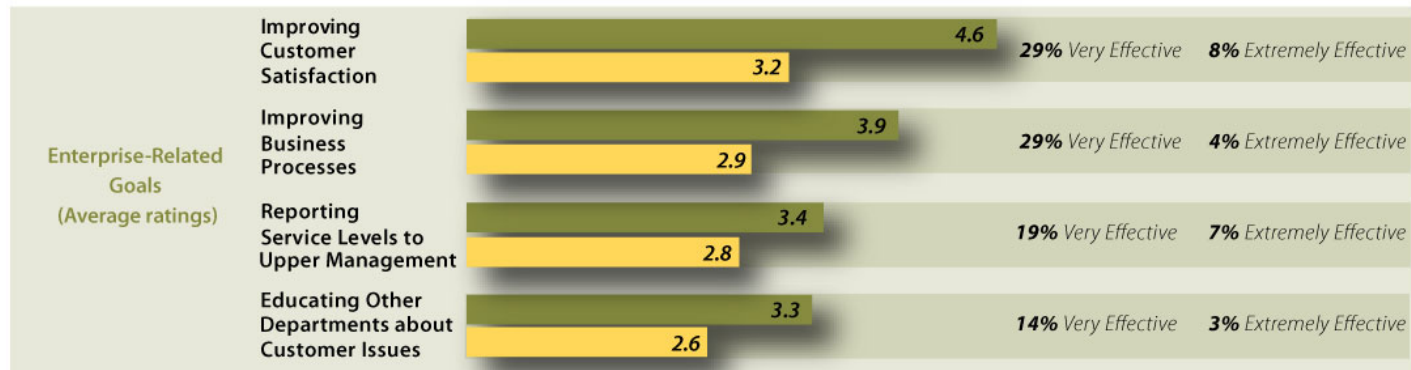
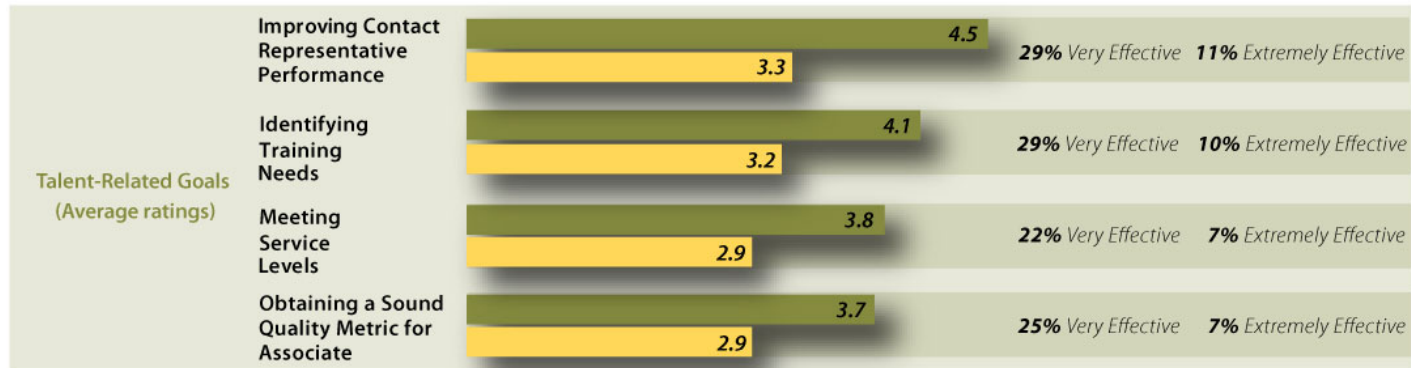
Most QA programs get at basic requirements



It's not working...

The Monitoring Effectiveness Gap

The Importance versus Effectiveness of Monitoring



Importance Ratings: 1 = Not Important at All, 2 = Somewhat Important, 3 = Important, 4 = Very Important, 5 = Critical

Effectiveness Ratings: 1 = Not Effective at All, 2 = Somewhat Effective, 3 = Effective, 4 = Very Effective, 5 = Extremely Effective

A missing ingredient: Walking in the customer's shoes ... really!

Perspective Taking (PT)

The cognitive act of imagining oneself in another person's position and adopting his/her viewpoint.

(Piaget, 1932)

*Thinking
Feeling*

Responding with empathy / understanding

How often do your agents...?

- ↳ Imagine how things look from the customer's perspective?
- ↳ Think about how they would feel in their situation?
- ↳ Try to see things from their viewpoint?
- ↳ Try to imagine themselves as a customer in a similar situation?
- ↳ Feel concerned for customers if they are experiencing difficulties?
- ↳ Understand when customers get frustrated?
- ↳ Identify and empathize with the problems customers experience?

Axtell, Parker, Holman and Totterdell, 2007.

What does Perspective Taking sound like?



What does Perspective Taking sound like?



Call Guidelines to Support Perspective Taking

- + = Exceeds Expectations
- ✓ = Meets Expectations
- = Falls Below Expectations

Tailored Solution

- + Shared personal positive experiences (or those from a fellow employee) with the customer in a particularly engaging and persuasive manner
- + Provided additional detail beyond what was requested
- + Educated the caller on how to avoid the problem in the future
- ✓ Shared personal positive experiences (or those from a fellow employee) with the customer
- ✓ Provided the basic information needed to resolve the inquiry or answer the caller's request
- ✓ Explained basics of why caller's problem occurred
- ✓ Explained in general terms what was going to happen next
- Did not share personal experiences (or those from a fellow employee) with the customer
- Did not provide complete or sufficient information to resolve the inquiry or answer the caller's request
- Provided laundry list of information
- Provided no information on why the caller's problem had occurred

When agents take the customer's perspective, they are more able to *effectively*...

- ↳ Offer personalized information
- ↳ Anticipate customer requests
- ↳ Offer explanations/justifications
- ↳ Educate customers
- ↳ Provide emotional support

We'll call these “customer oriented behaviors”

Rafaeli, Ziklik, Doucet (2008). The Impact of Call Center Employees' Customer Orientation Behaviors on Service Quality. *Journal of Service Research*, 10(3), 239-255.

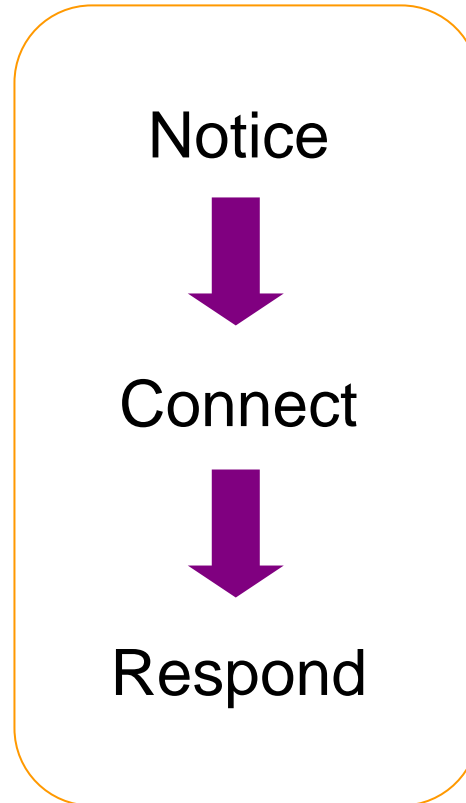
Effective QA programs drive customer-oriented behaviors



Typical:	Customer-oriented behaviors are also critical:
<ul style="list-style-type: none">↳ Resolve customers needs↳ Compliance↳ Information accuracy↳ Probing↳ Communications↳ Procedural courtesies↳ Empathy	<ul style="list-style-type: none">↳ Offer personalized information↳ Anticipate customer requests↳ Offer explanations/justifications↳ Educate customers↳ Provide emotional support

Quick hit: How do we get Reps to take the customer's perspective?

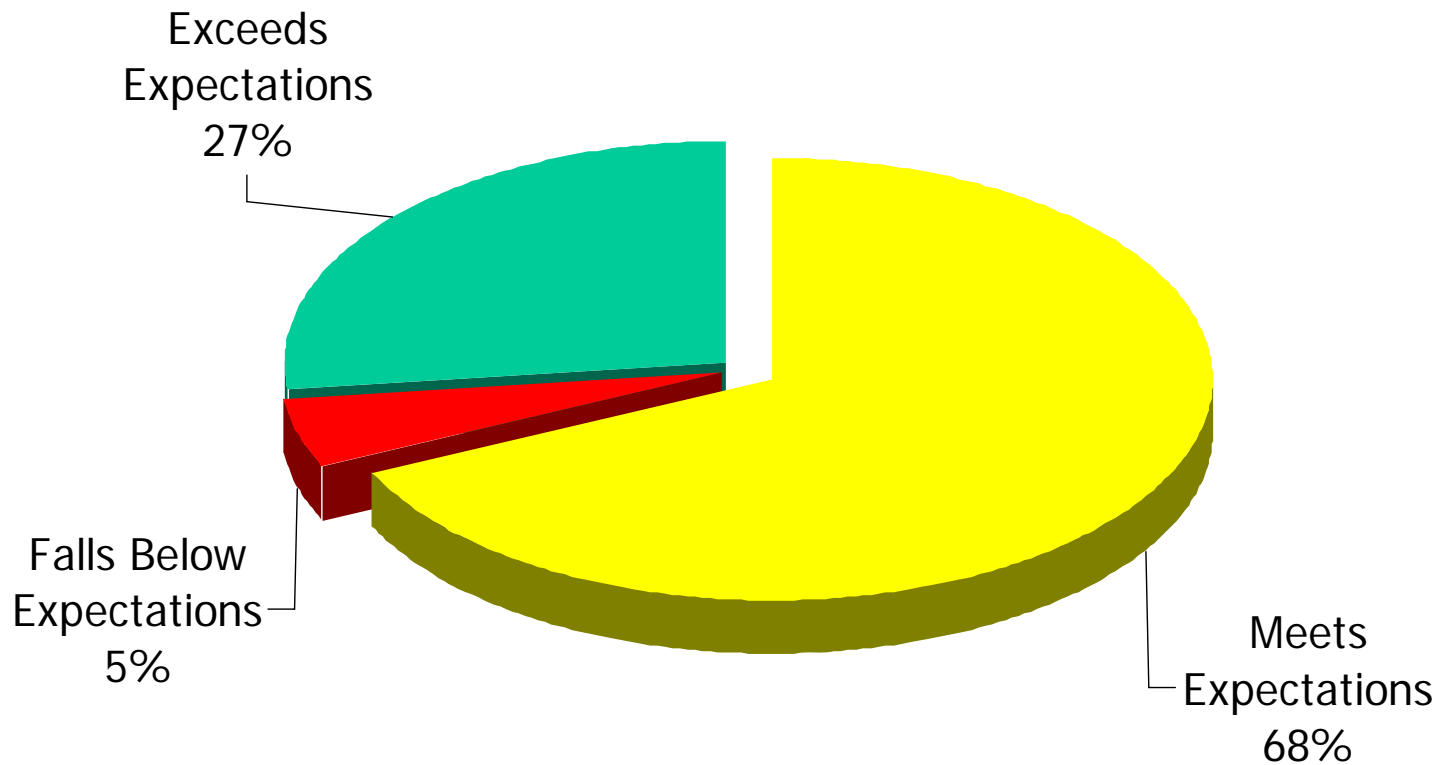
Three steps:



Miller, 2007. Journal of Applied Communication Research.

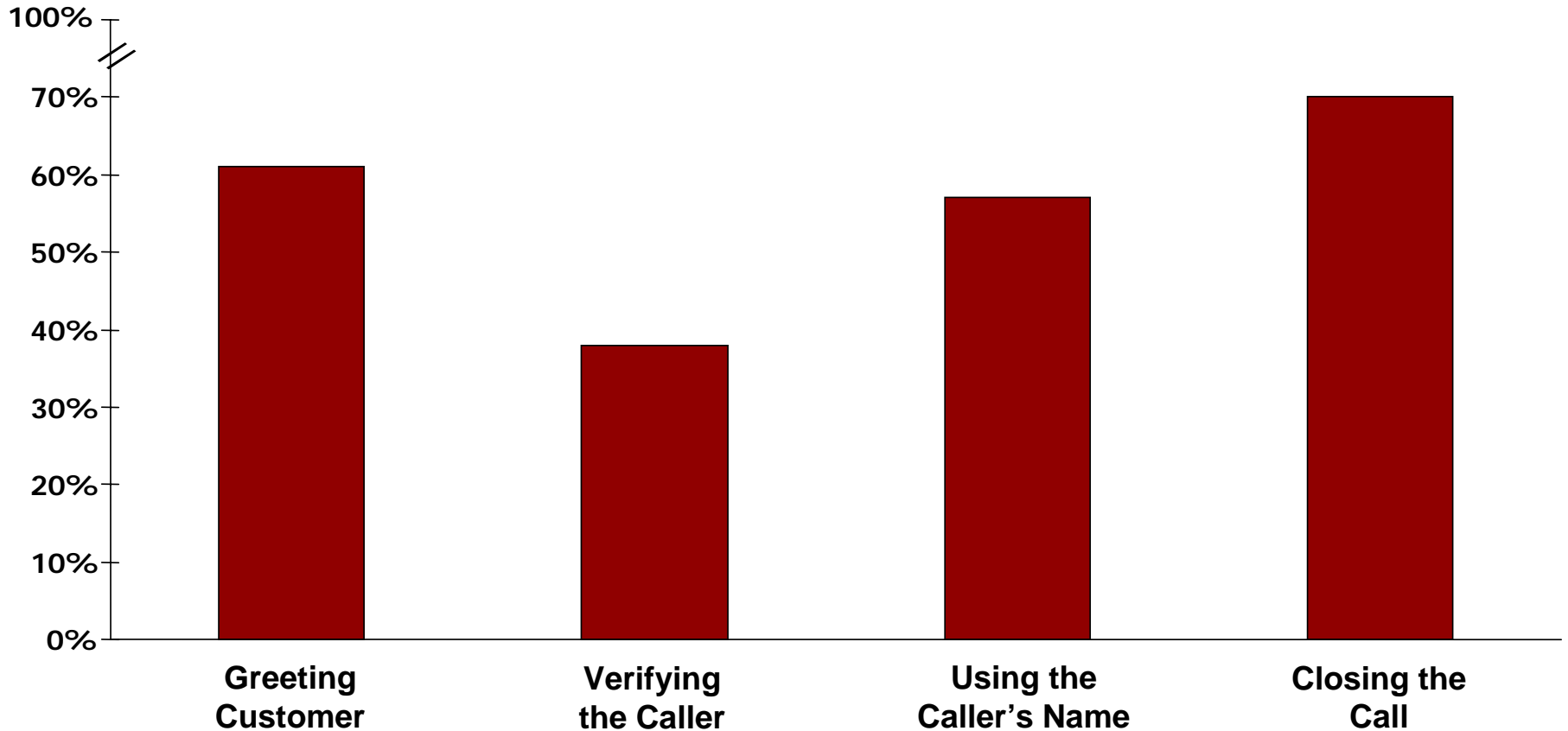
Opportunity to Display Customer-Oriented Behaviors

Based on Aon's Call Monitoring Database



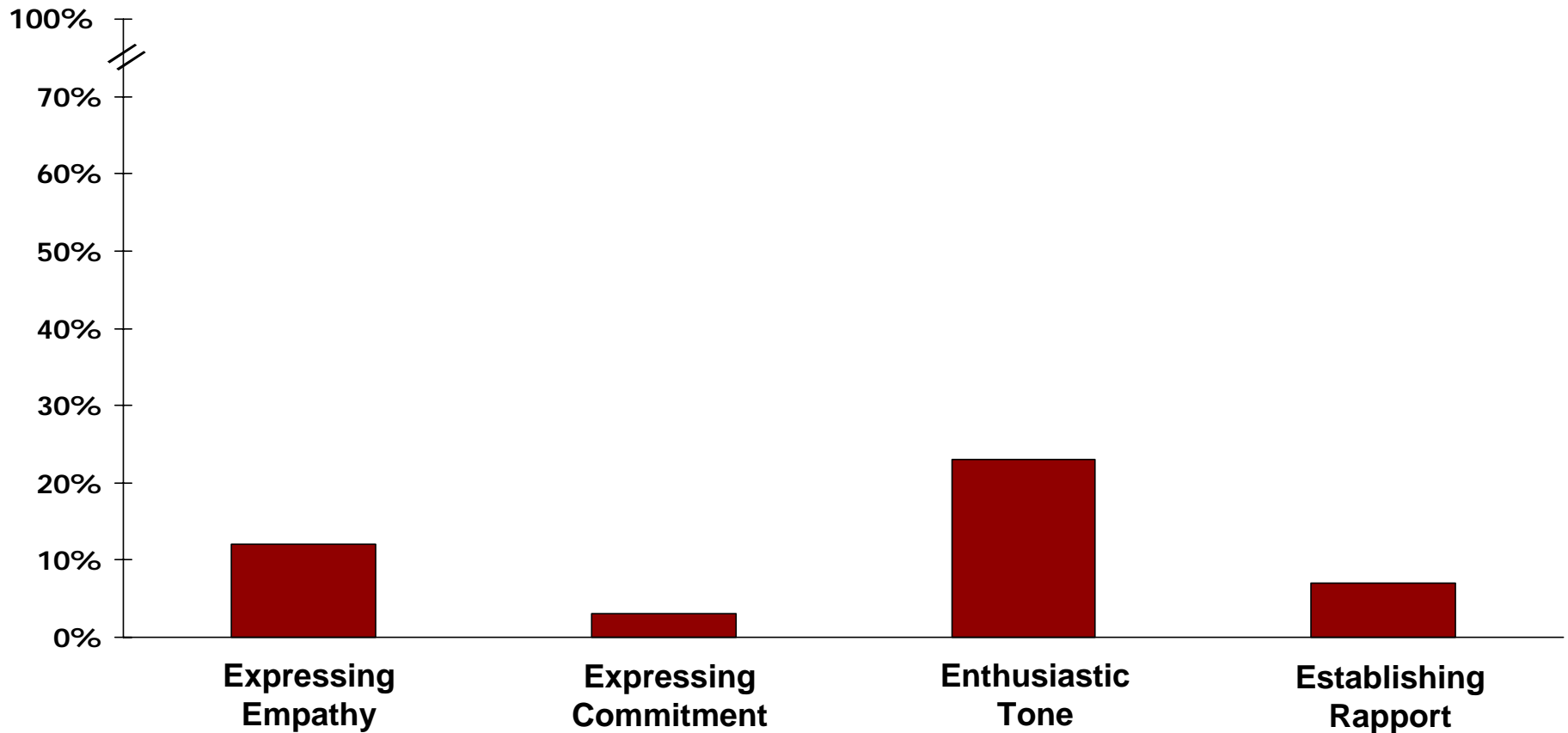
Behaviors “Exceeding Expectations”: Procedural

Based on Aon’s Call Monitoring Database

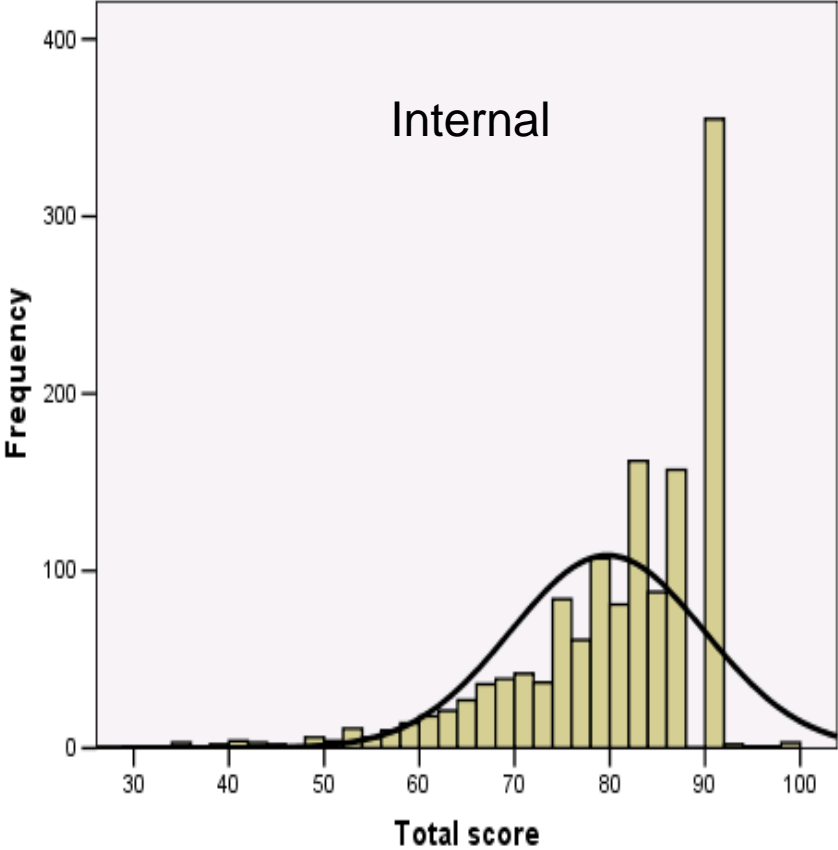
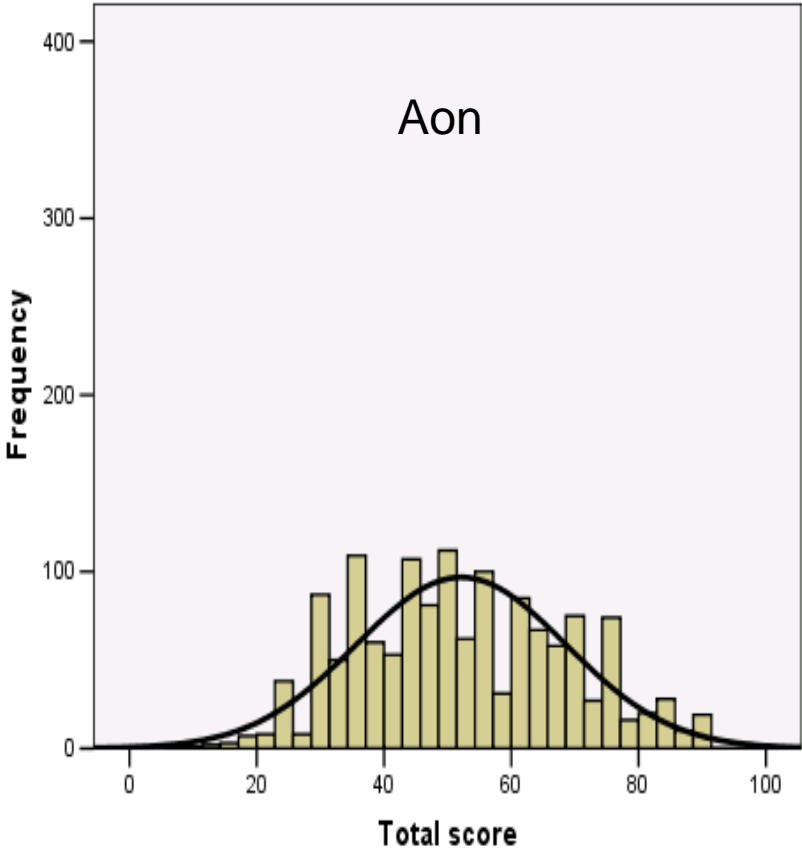


Behaviors “Exceeding Expectations”: Non-procedural

Based on Aon’s Call Monitoring Database



Ensure Scores Differentiate Behavior



Engagement is Critical

Drivers

People

Environment

Easier

Easier



+



More Difficult



- Fully engaged employees are:
- ✓ **Passionate** and **enthusiastic** about their work
 - ✓ **Devoted** to getting the job done right
 - ✓ **Immersed** fully in the task at hand
 - ✓ **Focused** and **concentrate** intensely while on the job
 - ✓ **Driven** to do whatever it takes to complete the task

Outcomes

Short Term



Long Term

Key Take-Aways

For a Customer-Centric QA Process

- ↳ *Start* building your monitoring program on your strategic objectives
- ↳ Build agent's ability to take the customer's perspective.
- ↳ Make sure your QA process “listens with the ear of the customer”
- ↳ Ensure monitoring data yields a strong distribution of scores; identifies strengths and opportunities at all levels
- ↳ Service Culture: Look more broadly at your organization
 - Hiring
 - Training and coaching
 - Engagement
 - Enablement
 - Job rotation
 - Communications and key messages

I'd love to hear from you!

Miriam Nelson, Ph.D.
Aon Consulting
212.441.2152
Miriam_Nelson@aon.com

