CREATE AN ADVANTAGE THROUGH A WINNING MONITORING PROGRAM

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CREATING THE UNCOMMON CALL CENTER

Create an Advantage through a Winning Monitoring Program

Abstract

You monitor your agents to uphold your commitment to quality and constant improvement. Accurate monitoring not only helps management identify the skills and knowledge agents need but also provides valuable input regarding their compensation and advancement opportunities. The key to success is to develop a monitoring form that measures what is important to your organization; and to implement a monitoring process that builds confidence in both your agents and supervisors.

This article outlines the attributes of a winning monitoring form—one that is flexible, fair, and comprehensive. It also answers the most frequently asked questions about the monitoring process. How often? By whom? At what intervals? It explains how monitoring goes hand-in-hand with training—one program should not exist without the other.

Monitoring is an art as well as a science. This article explores strategies that can help supervisors present information—even negative information—to agents in a way that will ultimately help them achieve success.

Create an Advantage through a Winning Monitoring Program

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How many calls do you monitor per agent per month? Have you heard the statistic that "world-class" contact centers monitor five to ten calls per month? Have you ever had an agent tell you that it is not fair to base her evaluation on such a small percentage of monitored calls? Are you confused by how to define a statistically significant sample? Are you concerned about the fairness and accuracy of your monitoring program? Are you asking how you can design a call-monitoring program that allows you to make the short-and long-term decisions required to ensure happy employees and a quality organization?

These are just a few of the questions I will address in this article. I will try to help you understand all the critical components of a call-monitoring program that, when put together, give you a valid, defensible evaluation of quality.

Developing the Call Monitoring Form

The foundation of any monitoring program is the call monitoring form, and we have a few suggestions for you as you design this important document.

Make the form easily updateable
The form must change over time. I'm sure you are well aware of the fact that nothing ever stays the same in the contact center (that's an understatement if I've ever heard one). Customers' needs change, and the products and services of the company change. You get smarter about how to deliver excellence. Each one of these changes means that the call monitoring form must be updated.

We suggest that companies put a process in place to update the form every quarter. The process of modifying the form is quite involved and usually cannot be done any more frequently. It is important to have one person act as the conduit for all the change requests. Remember that the requests can come from anyone - agents or supervisors. This "conduit" funnels the requests to a change team that evaluates each request and decides if it is in line with the intention of the form. If the changes are not adopted, the conduit is responsible for telling the person who made the suggestion why they were not. If the changes are adopted, the form is updated, the change is communicated, and the agents are trained on the new quality requirement.

Make the form specific
List items down to the skill and knowledge level. Determine the reason you have a call monitoring form in the first place. If the reason is to assess the performance of the agent during a call and provide coaching when the agent struggles, then it is imperative to design the form so that you can watch the trends of performance all the way down to the skill and knowledge level.

Let's say that you have a category called "listening skills" on your form. After monitoring several calls, you discover that you marked that the agent was struggling with listening on each call. But, in retrospect, how do you know what to coach on? Was the person interrupting the customer on each call? Or, was he struggling with knowing how to paraphrase the customer's request?

"Listening" is a broad topic that can be broken down into skill and knowledge components. If you had a line item that referenced "interrupting" and another line item that referenced "paraphrasing," then you could trend a skill deficiency and easily design coaching sessions based on these trends.

Develop the form based on the competencies required by the job
Some people forget the reason for the call observation form. The call monitoring form is an assessment instrument to determine if the agent has mastered all of the skills and knowledge required to deliver excellence on the phone. The form is used to determine when an agent has mastered a skill or if he is struggling with it. If he struggles with it, then coaching is designed to help him master it. If he has mastered it, then the person is rewarded and recognized.

The call monitoring form is developed based on the job role, the competencies (the predictors of success), and the associated KSAs (knowledge, skill and attributes).

Develop a definition list that accompanies the monitoring form
We commonly call such a document a nuance list. Once the competencies and KSAs are listed on the monitoring form, there is not much physical room left to define the nuances of the skill for your environment. For example, you may have a skill on the form that says, "proper company greeting." But what does that mean? What is the proper company greeting? How does everyone know what you expect here?

The definition list is used to define the nuances of the KSAs for your environment. Under "proper company greeting," I might put something that is scripted (e.g., Thank you for calling Response Design. This is Kay. How may I help you?). Or, I may have a list of items the person must say (e.g., identifies company, identifies self, asks how he can help the customer). This nuance list is invaluable when we start talking about calibration later in the article.

Make space to record comments
We have a rule at Response Design: you cannot mark that a person is struggling with a skill unless you also write a comment about what you heard on the call that demonstrated that struggle.

Imagine someone came to you and told you that you were struggling with interrupting the customer. What's the first question you might ask? I know the first question I always ask is, "Can you give me an example?"

Your comment on the call monitoring form should be written such that the example is solid. It should contain the point in the call where you heard it ("Remember when the customer was giving you his account number?"), what you heard ("You didn't wait for him to finish. By that time you had pulled up his account and were ready to move on. You talked over him by asking the next question.") and the possible downsides to the situation if it were to continue ("The customer might perceive that you were trying to hurry her off the phone. That could result in a dissatisfied customer.")

Think through the implication of the various ways to score a call
There is no one right way to score a call. There are multiple options. You might score a call with what we call an "on/off switch." The "on" switch means the skill was demonstrated. The "off" switch means the skill was not demonstrated. You can also score using a scale (1-5, poor to excellent, etc.). Each way of scoring has its own unique upside and downside.

The on/off switch means that as you listen to a call, you are listening for a consistent demonstration of the skill throughout the call. "On" means that there was a consistent demonstration of the skill throughout the entire call, and the person would not benefit from any coaching. "Off" means that there was an inconsistent demonstration of the skill throughout the call, and the person would benefit from coaching.

Many people struggle with the on/off switch because it doesn't seem fair to lose all the points for a skill if the agent did it right some of the time. That's why many people prefer to score using the scale. At least with a scale you can give partial credit.

The upside to the on/off switch is that the consistency of scoring from monitor to monitor and call to call is usually much higher. It is much easier for a monitor to make a determination between "consistency in skill demonstration" and "inconsistency" than it is between the gray zones of a 1, 2, 3, 4 or 5 demonstration of a skill.

Think about the messages that the words are conveying
What do you call your call monitoring form? What do you call the scoring options? Believe it or not, this wording is critical to conveying a message about your contact center culture and your management team's perspective on assessment.

Be creative. Think about what you want to convey about the process. What is the difference in the message if the form is called the "Customer WOW Form" versus the "Call Assessment Form?" How about if (instead of labeling the on/off switch "yes" and "no") you label them "needs coaching" and "demonstrated excellence?"

Weigh the components
Certain competencies (along with their related KSAs) contribute more or less to the quality of the interaction with the customer. These differences should be reflected in the point value assigned to each component. When you compare the closing of the call to listening skills, which seems to contribute more to the quality of the call? However you answered, that competency should have a higher weighting.

Defining the Monitoring Process

Once the monitoring form is in place, managers must decide on the ground rules of the monitoring process.

Number of Calls to Monitor
This is the topic where I like to state the proverbial, "I wish I had a nickel for each time someone asked me how many calls should be monitored per agent per month."

The number of calls to monitor really depends on the reason you're monitoring. Typically there are two reasons:

<u>Reason number one:</u> *short-term determination of the skill and knowledge needs for coaching.*
In the short-term, monitoring determines skill and knowledge needs for coaching. The benchmark of five to ten calls per month is really based on this reason. By looking at a sample of calls, I can determine trends in a person's performance. By trending the areas in which she is struggling, I can develop action plans to help her improve in her skill and knowledge.

<u>Reason number two:</u> *long-term determination of performance for pay, promotion or termination.* In the long-term, monitoring determines performance for pay, promotion, or termination. Typically, this is the area where contact center people start talking about statistically significant samples and "how can you base decisions on such small sample size?" The fear of making the wrong decision based on the wrong information is a valid concern. But statistics help here.

First of all there is no such thing as a "statistically significant sample of calls." By its very definition "statistically significant sample" implies that there has been nothing to influence the agent between each call observation. In the contact center, that's impossible. Any time a coach gives feedback or teaches the agent something, that agent has been influenced (albeit influenced positively).

So, we must turn to another statistical axiom for help. In statistics we can define a sample size that will stabilize the outcome of the observations and give us confidence in the decisions we base on this data. We can determine a sample size that will decrease the variability or error to a very reasonable level.

First there is the Law of Large Numbers. This says that numbers tend to stabilize as the sample size increases. The "Rule of 30" comes from the transition from the t-statistic to the z-statistic. Basically, the variability of the sample is about the same as the variability of the population after n=30. Thus, by inference, sample sizes over 30 are good estimates of the population. Without going into a lot of additional statistical definitions, this means a good sample size for call observation turns out to be 30 or more call observations.

Therefore, you should make no pay, promotion, or termination decisions without a sample size of at least 30 call observations. As stated before, it's okay to make coaching decisions based on fewer than 30 observations, but you should not make career enhancing or limiting decisions on fewer than 30 observations.

So, if you are routinely monitoring 10 calls per month per agent, you can use those 10 calls for determining coaching plans, but you must wait for three months (or 30 observations) before you decide on pay, promotion, or termination.

Various days
Ever had one of those days when nothing ever seemed to go right? Yes, me too. Well, that same thing happens to the agents. This does not mean it gives the agents a license to provide shoddy service; it just means that it's not fair to monitor all their calls on the same day.

By monitoring on various days you increase the validity of your assessment and overcome the objection of, "You just caught me on a bad day."

Various times of the day
I don't know about you, but right around 3:00 in the afternoon my energy heads south. If you were to monitor all my calls between 3 and 4, you probably wouldn't get a very good view of my overall capabilities. Again, this is not an excuse for providing less than excellence. It's just a fact of life.

So, by monitoring at various times of the day, you again will get a more accurate assessment and overcome the objection of, "You just caught me at my down time of day."

M*ore than one person*
I'll bet you've never heard the excuse, "The reason I got such a low performance review is because my supervisor doesn't like me." Or "Mary always gets high marks; she's the supervisor's favorite."

Well, to overcome this hurdle we suggest that more than one person monitor each agent. If you are monitoring ten calls per month, have one person monitor five calls and have a different person monitor the other five.

Consistent number of calls for each agent
It may seem obvious but we go into a lot of contact centers where there is no consistency on how many calls are monitored per agent. I'm not talking about cases in which managers monitor employees right out of training more than they do veteran employees. I'm talking about the situations in which "I just ran out of time and didn't have the opportunity to monitor five calls for everyone." Some of my people had five monitors, others had only three.

Each agent must know that his final assessment is fair as compared to every other agent—especially when there is compensation tied to it! One of the ways to ensure this is to assess each agent using the same number of calls. This includes number of assessments per evaluation period.

Calibration

Calibration is the process that ensures any two people can listen to the same call and score the quality of the call the same. The first step in calibration is to ensure everyone defines excellence in your center the same.

For example, in the greeting, are your agents allowed to say "How can I help you?" versus "How may I help you?" "How **can** I help you" is grammatically incorrect ("can" denotes ability, "may" denotes permission). Some contact centers say that the difference is so slight—that "can" is permissible (they cannot imagine holding agents accountable for that). Other contact centers can't imagine not holding agents accountable for all levels of grammar.

I use this illustration not to say one way is right and one is wrong. The point is that contact centers have different definitions of excellence. And until your definition is clear, some of your monitors may score the call one way while others will score it a different way.

The next step in calibration is to move the team to a tolerable level of scoring variance (this "tolerable level" must again be defined by your team. Some companies aim for a 4 percent to 6 percent variance).

Calibration is accomplished through a grueling process of, as a team, listening to a call, scoring the call, and discussing the call with each other. It is through the discussion that the team becomes calibrated. In our experience it takes a team approximately fifty to sixty hours to calibrate. Then it takes approximately four to six hours a month to stay calibrated. That's quite a commitment!

Supporting the Monitoring Process

There's one last step to ensure you have the best process possible—training. Ensure that you can support any skill deficiencies you have noted. It's not okay to go to someone and tell that person that his voice quality is below par and, "Oh, by the way, I don't have any means to help you improve." You might as well be saying to him, "Try harder, do better." The help you provide can be internal (mentoring, coaching modules, role-plays, etc.) or external (public courses or seminars, classes at local schools, etc.).

After the call monitoring sheet is designed, assess if you can support the development of each knowledge, skill, and attribute (KSA). If not, our suggestion is to put that KSA in a holding tank (take it off the form) until you can coach to it.

Conclusion

To have an accurate internal assessment of an agent's interaction with customers, you need to complete three actions:

Design a tailored monitoring form and keep it continually updated.
Develop a well thought- through monitoring process.
Provide complete support for each KSA represented on the monitoring form.

Once you have done these things, you are well on your way to having a fully defensible quality-monitoring program.

Kathryn Jackson, co-founder of Response Design Corporation (RDC) and call center expert helps professionals get more from their call center. Response Design is the how-to source for integrating the call center into the customer relationship. Its independent consultants use call center web seminars, contact center consulting, call center tutorials, call center benchmarking, world class customer service articles, and best-in-class customer service practices to ensure you get the most from your call center investment.

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