

Why Every Contact Center Needs Performance Management

AGENDA

- Common Challenges
- Performance Management Key Elements
- How an Application can Support These Elements
 - Examples / Demonstration
- Customer Success Stories

Challenges

Challenges

- ▶ **Data Lives everywhere**
- ▶ **Getting the Front Line engaged**
- ▶ **Omnichannel Performance – blended agents**
- ▶ **Ensuring Front Line Management takes action**
- ▶ **Agent / supervisor movement among teams**
- ▶ **Different Stakeholders have different needs**



Performance Management

Key Elements

Performance Management

*A culture and capability that
Increases performance awareness
and
Accelerates behavioral change to goals*

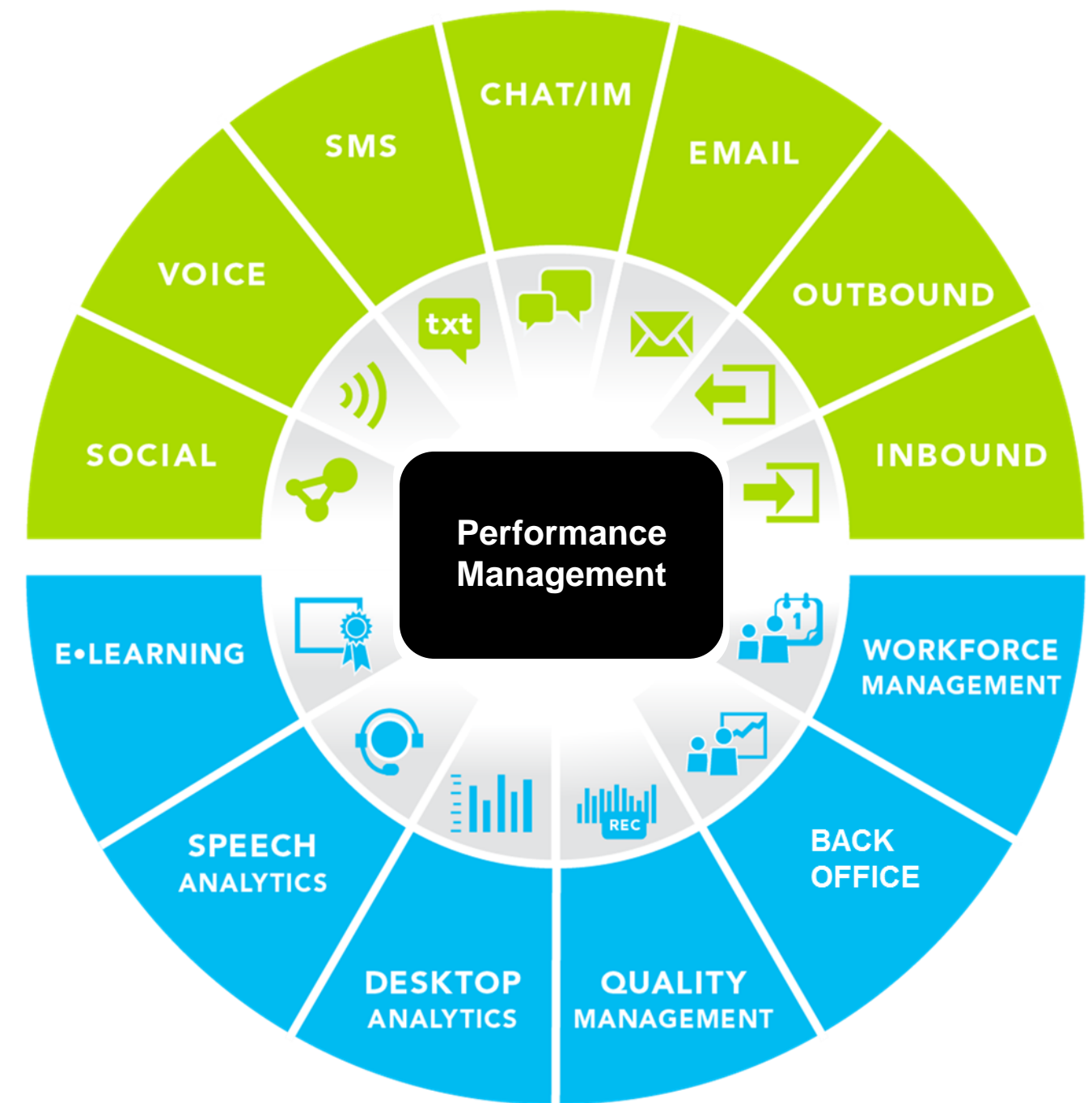
What Should a Performance Management System Do?

Engage Staff in Improvement to Corporate Goals

Empower Supervisors with Actionable Insight

Assist Management in Meeting Operational Targets

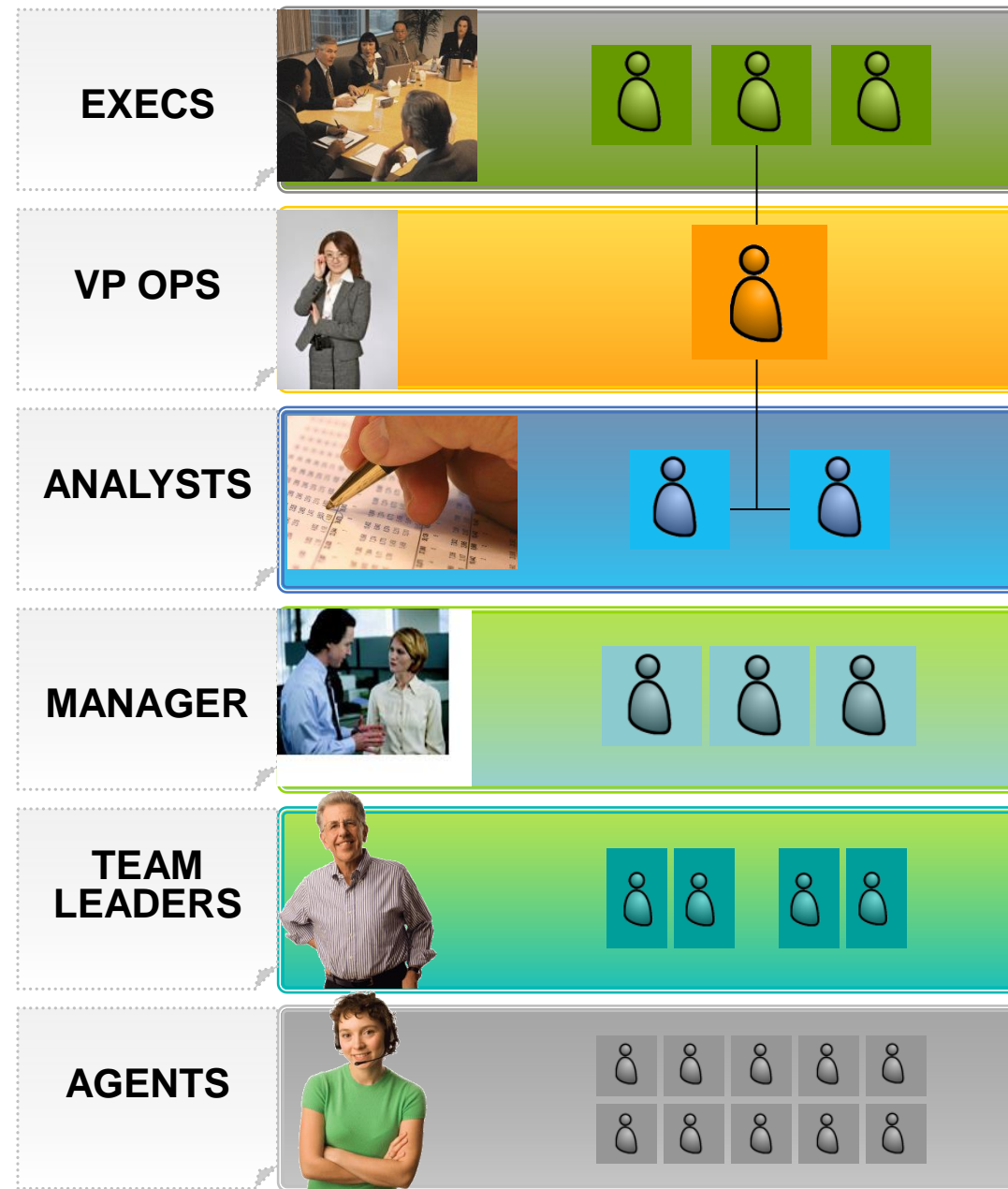
Consolidated Performance Views for Improved Insights and Correlations



Performance Reporting to Performance Management

- ▶ **Performance Reporting** – *what are our performance numbers?*
 - Consolidating data from different source systems
 - Calculating summary metrics and KPIs
 - Assigning goals and/or weightings against these metrics
 - Presenting metrics & goals into scorecards for various levels of staff
 - Tracking performance over time to help determine year-end / monthly bonus calculations
- ▶ **Performance Management** – *what are people doing about the performance data?*
 - Guiding management steps to improve behaviors
 - Providing automatic alerts when processes or behaviors need attention
 - Providing consistent business processes (aka workflows) as a framework to guide and track those steps
 - Capturing the effectiveness of these improvement processes
 - *A culture and capability that increases performance awareness and accelerates behavioral change to goals*

Performance Management Benefits – Different Needs for Different Roles



Alignment and Visibility to contact center performance relative to corporate objectives

Measures and Correlates efficiency & effectiveness, optimizing the value of the contact center

Automated and On-Demand reporting & scorecard creation with historical, drill down, root cause analysis and event-driven capabilities

Tracking and Trends of team performance and of the improvement program effectiveness

Instant Notification of problems or excellent performance – optimizes agent output and creates consistent coaching workflows

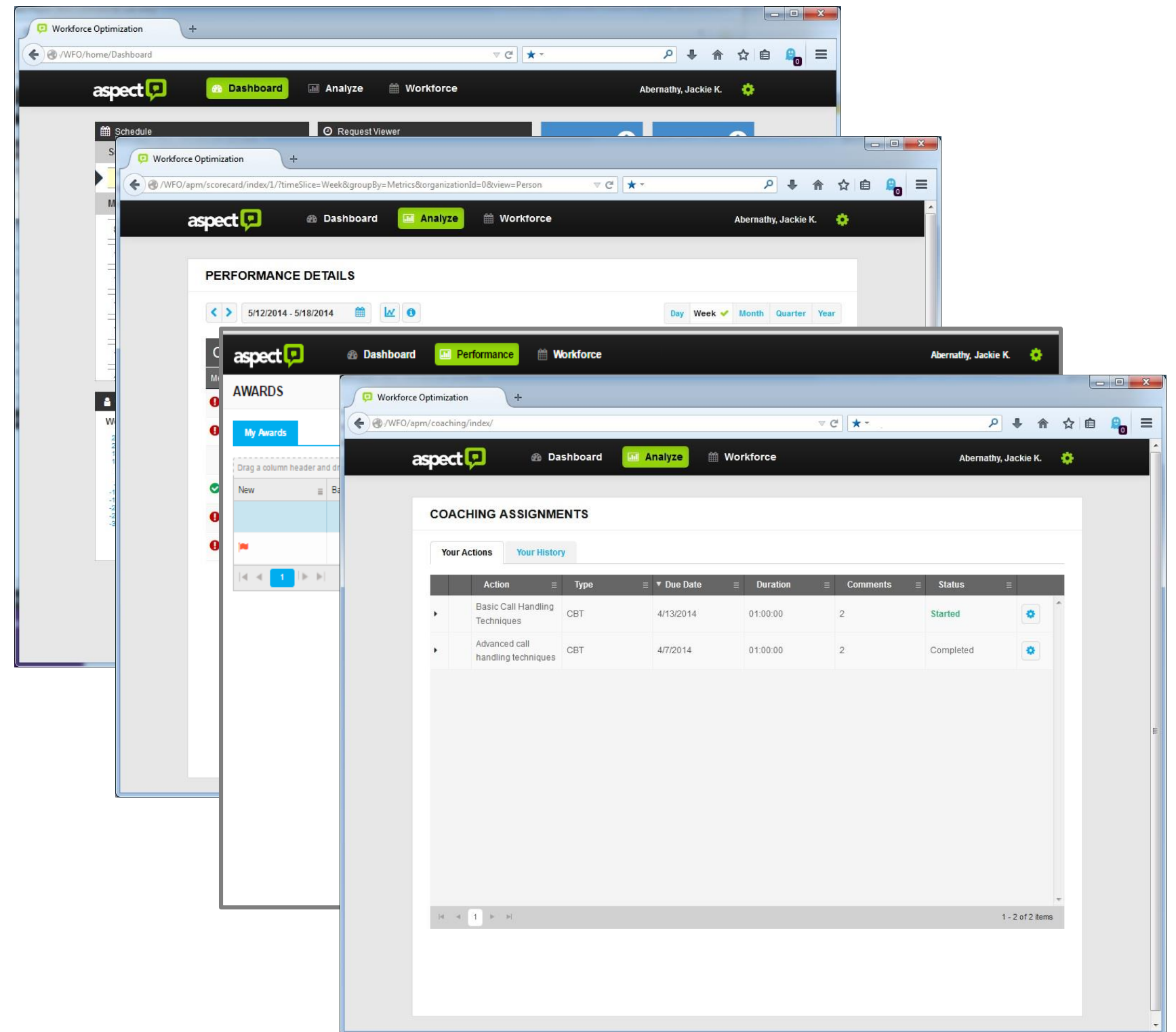
Up-to-the-Minute visibility of daily, monthly and overall KPIs, coaching plan achievement and compensation

Performance Management Application Supporting Key Elements

Engage with Easy Visibility by Role

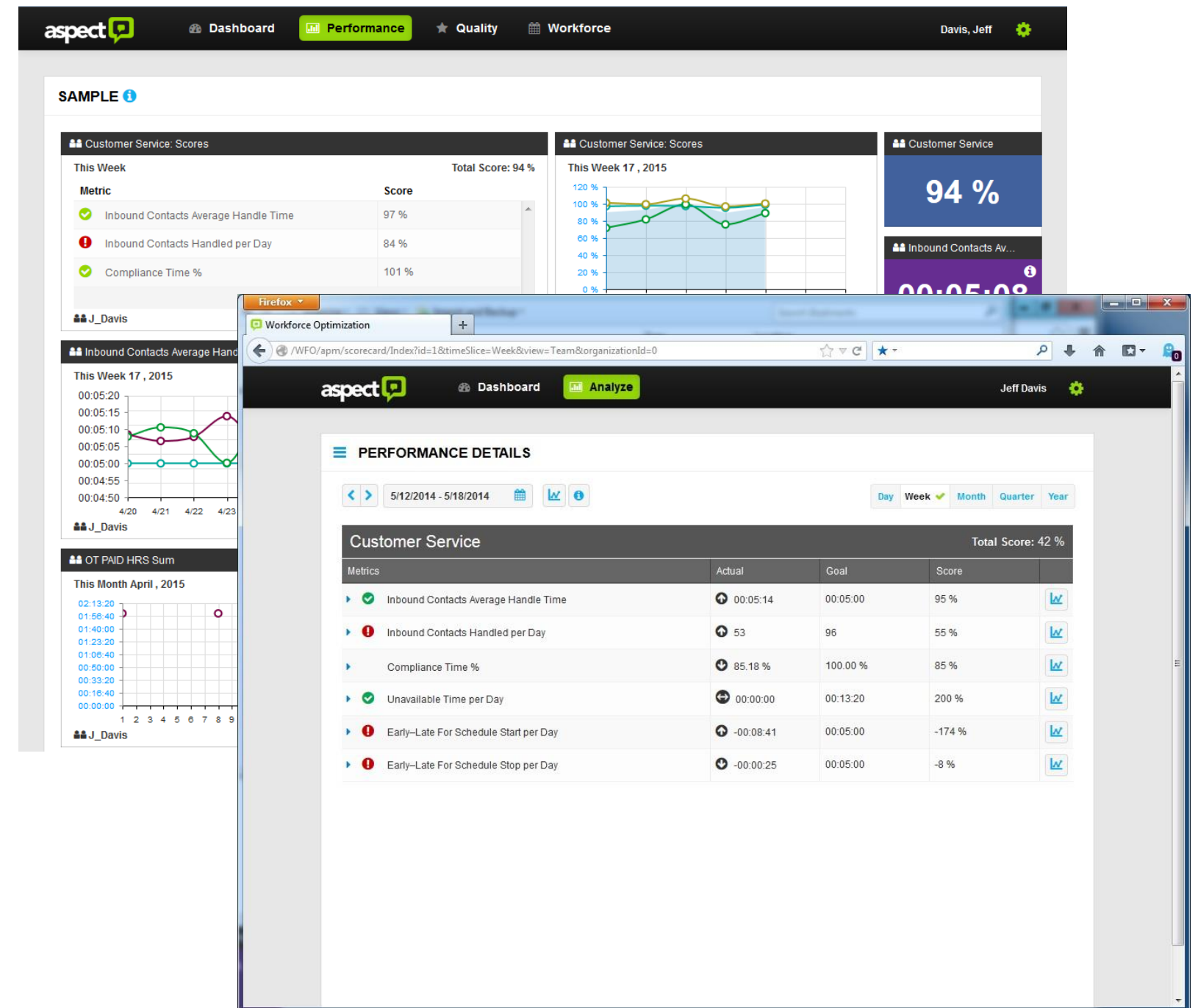
For Agents

- **WFO access on a single landing page**
- **Easy interactive navigation**
- **Simple self-awareness on performance goal attainment**
- **Awards & Gamification**
- **Coaching Access**



For Supervisors Simplify the “Day-in-the-Life”

- **Team Performance Management**
 - Agent Performance, Peer Awareness, Trends, Ranking
- **Root cause insight for coaching and development**
- **Accurate as Agents move**
 - Temporality
- **Enter Agents Once**
 - Available in all systems



Engage front line staff with Gamification

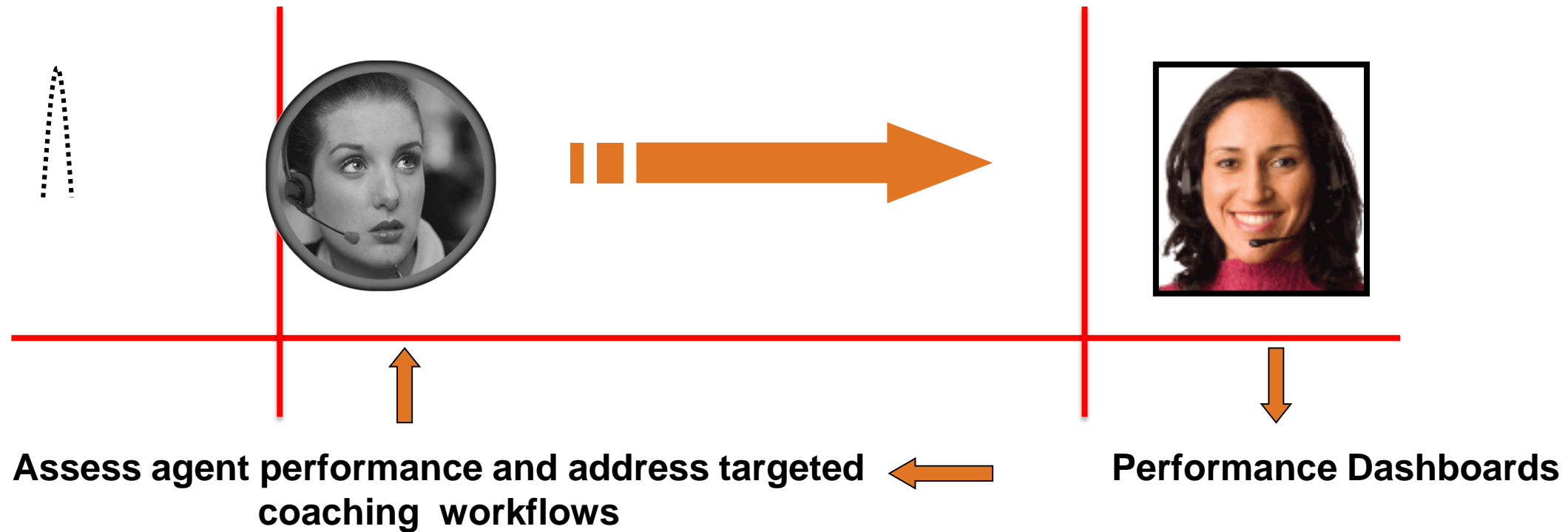
Targeted Agent Performance Improvement

Improving the performance of your agents enables them to be more effective and improve customer satisfaction

Bottom 20%

Middle 60%

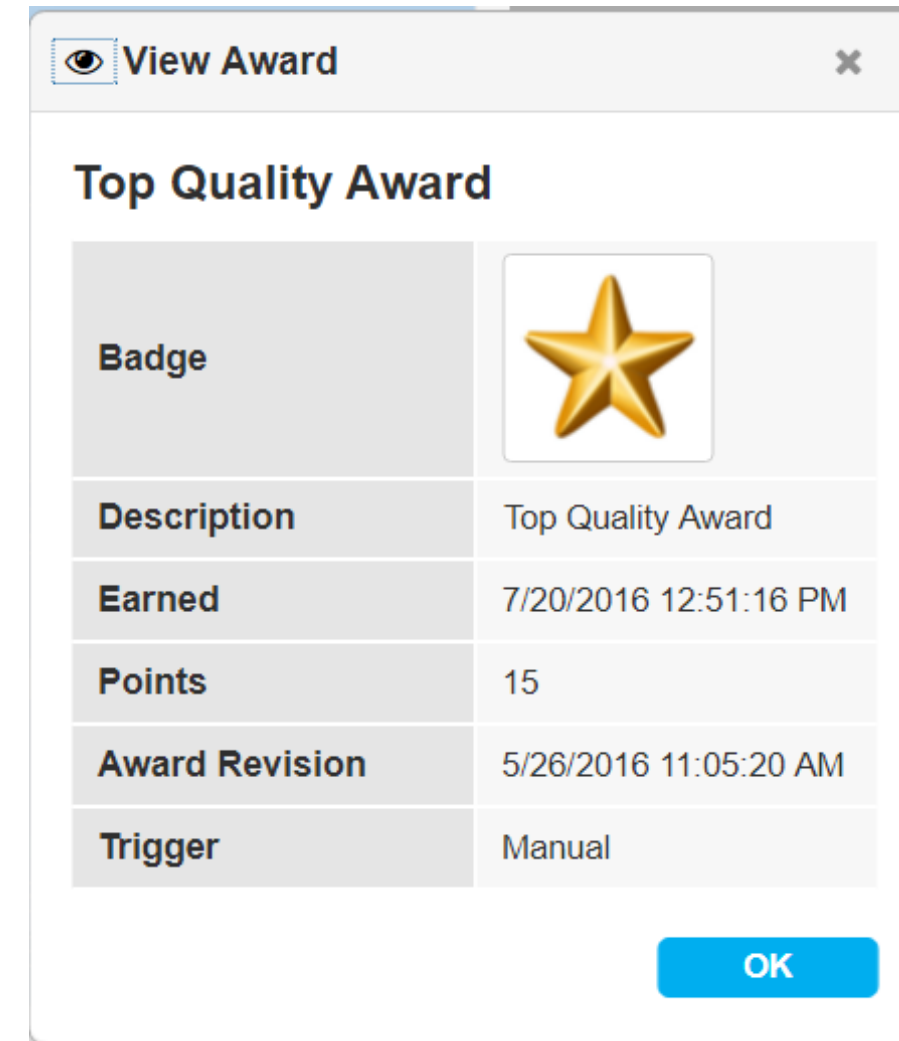
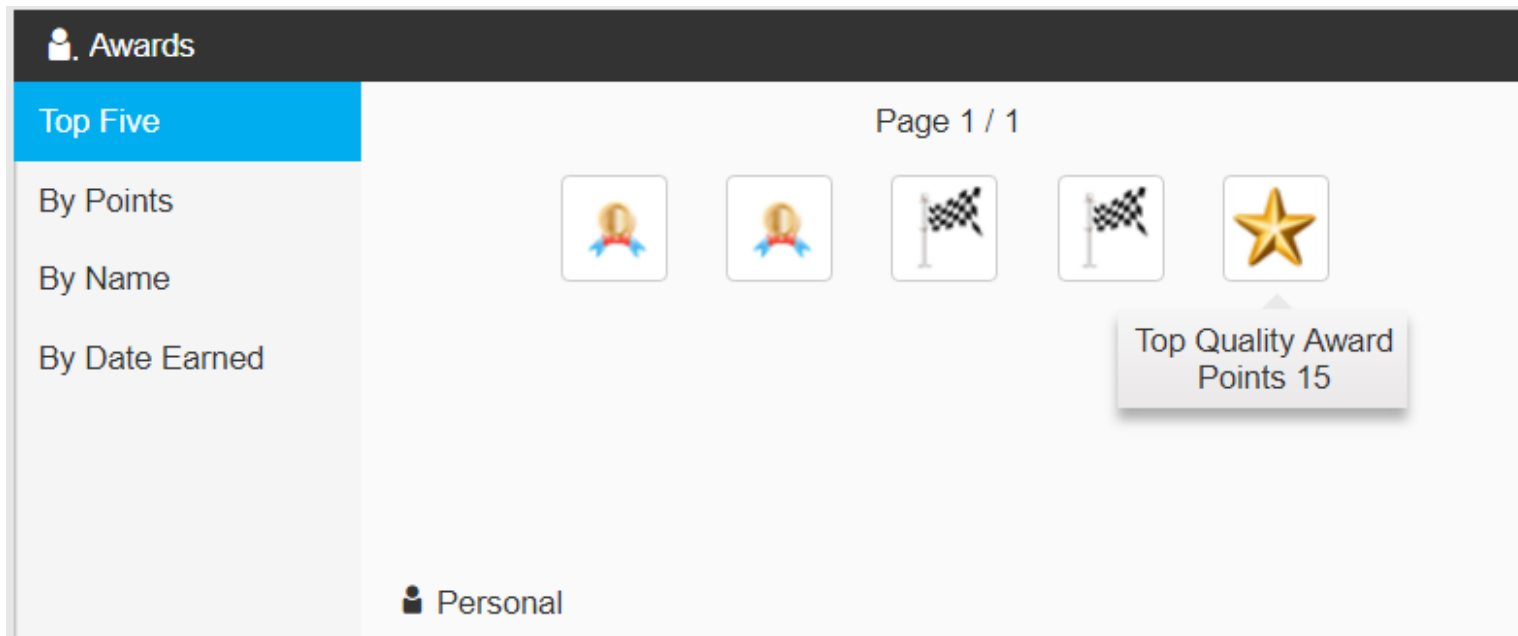
Top 20%



Improve Performance + Improve Employee Satisfaction = Improved Customer Satisfaction

Gamification – Reward & Recognition & Awards

- ▶ Manually Assigned
- ▶ Rules-based Allocation



Gamification – Contests & Challenges

- ▶ Flexible Scope
- ▶ Target KPI(s)
- ▶ Duration
- ▶ Rewards
- ▶ Minimum Thresholds

Challenges

SC: Collections - 2 Teams

1	SH	Haverty, Scooter P.	81.475 %
2	BH	Hatfield, Bob T.	72.369 %
3	AQ	Quarles, Angela	65.844 %
4	RR	Ramirez, Raoul	65.814 %
5	SW	Walker, Suzanne M.	64.677 %
6	AA	A2, Agent	61.272 %
7	KS	Smith, K. Lee	60.556 %
20	HM	McDougal, Harold B.	36.759 %
21	SP	Pittenger, Scott	33.214 %
22	CB	Bradford, Christine	30.216 %

Ends on 6/13/2017

Challenges

KPI: Compliance % (10RP 11Bdg 1Month) 2

1	VN	Neff, Vicki R.	10	🏆
2	DW	Webb, Dori M.	9	🏆
3	SP	Pittenger, Scott	8	🏆
4	JB	Bright, Jennifer P.	7	🏆
5	SH	Haverty, Scooter P.	6	🏆
6	ES	Smalley, Earl J.	5	🏆
7	TT	Trickett, Tim B.	4	🏆
8	SS	Stevens, Sally	3	🏆
9	MS	Stanley, Michael J.	2	🏆
10	KJ	Johnston, Kate C.	1	🏆

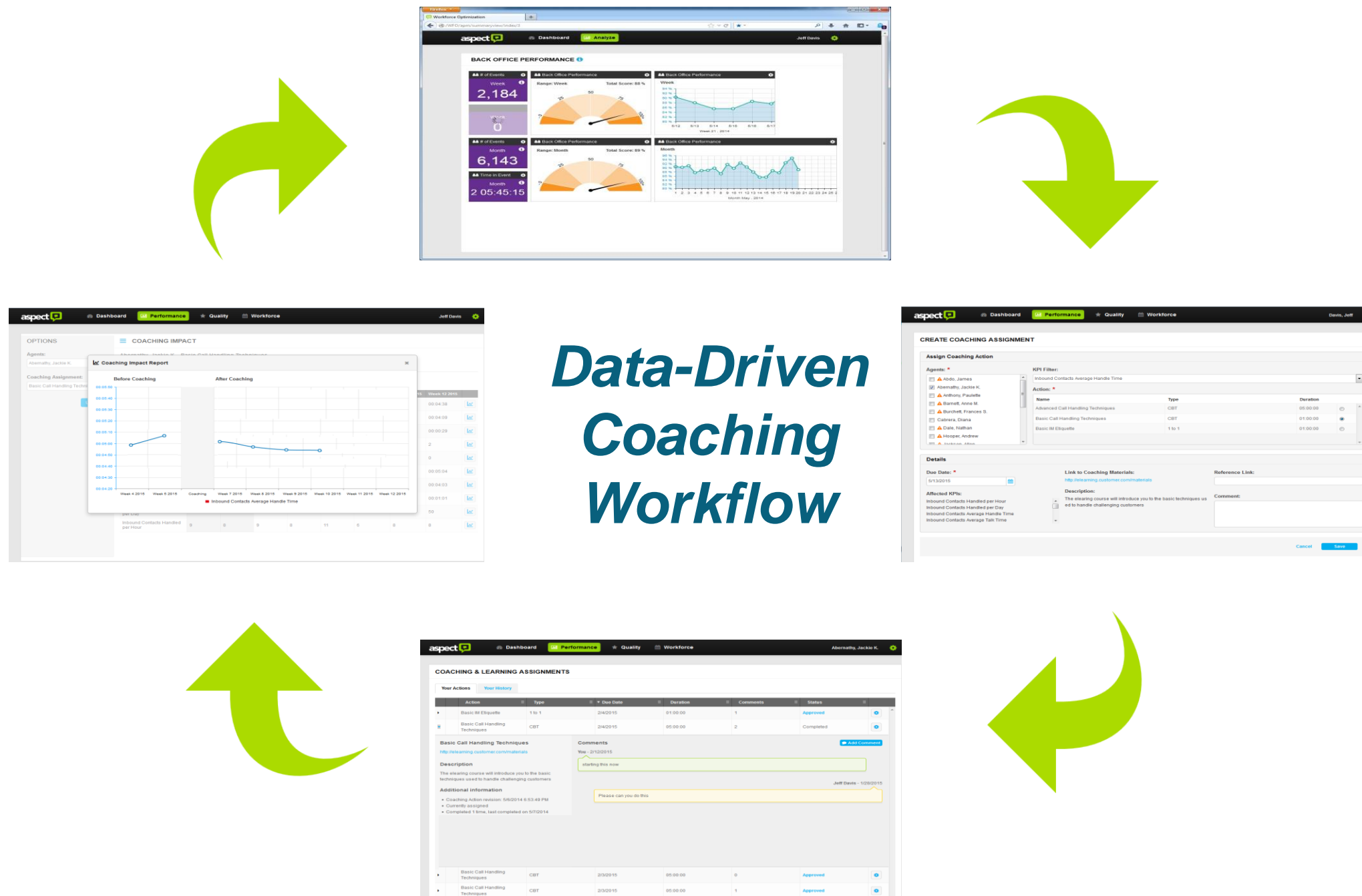
Completed on 5/31/2017

Empower Front Line with Coaching Guidance

Performance Improvement Workflow Process with Coaching

Supervisors see agent performance

Application determines if coaching has improved performance



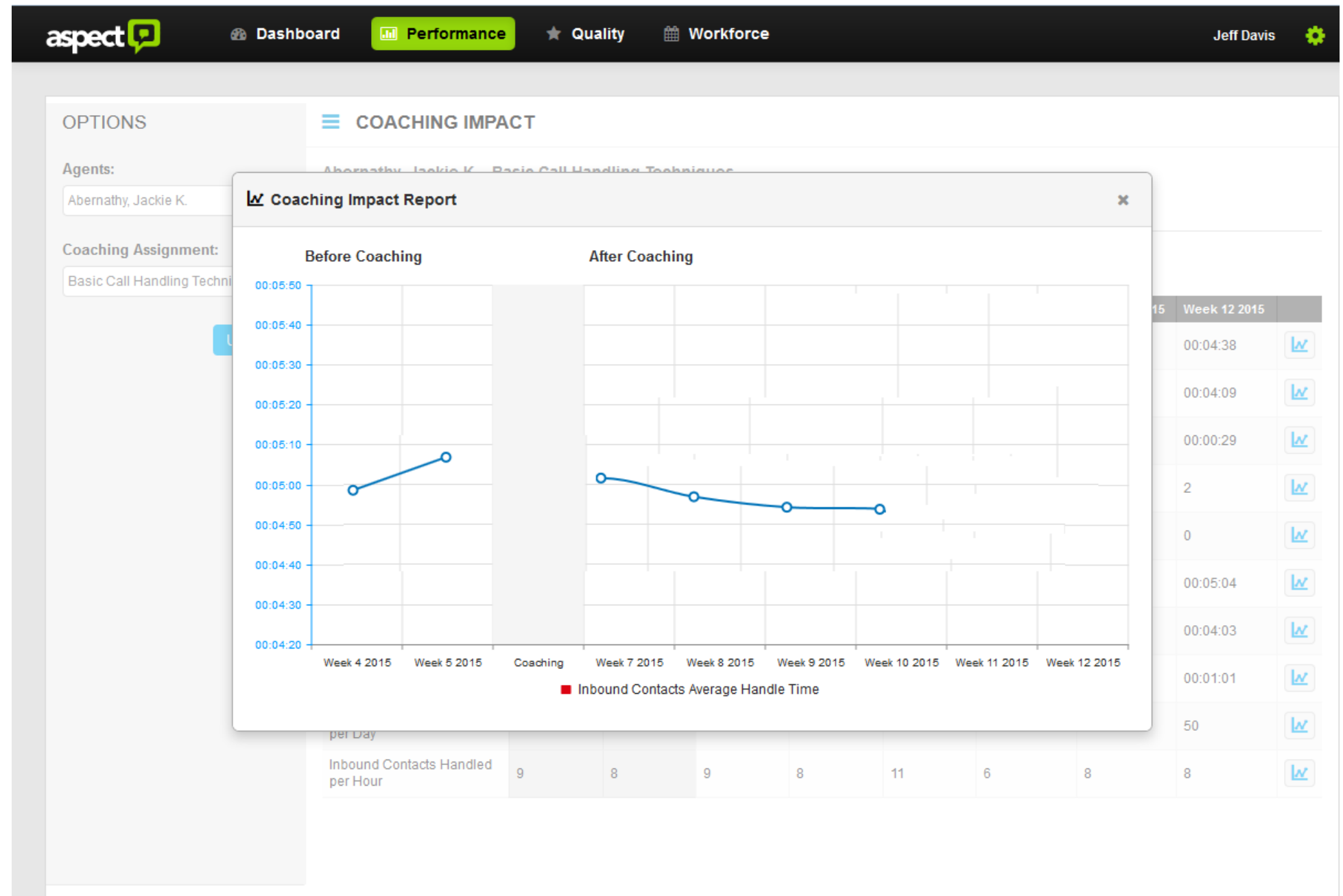
Data-Driven Coaching Workflow

Supervisors investigate performance areas & coach

Agents acknowledge coaching

Is the Coaching Effective?

- ▶ Before and after comparison



Empower Management with Performance Insights

For Management: Alignment to goals at all staff levels

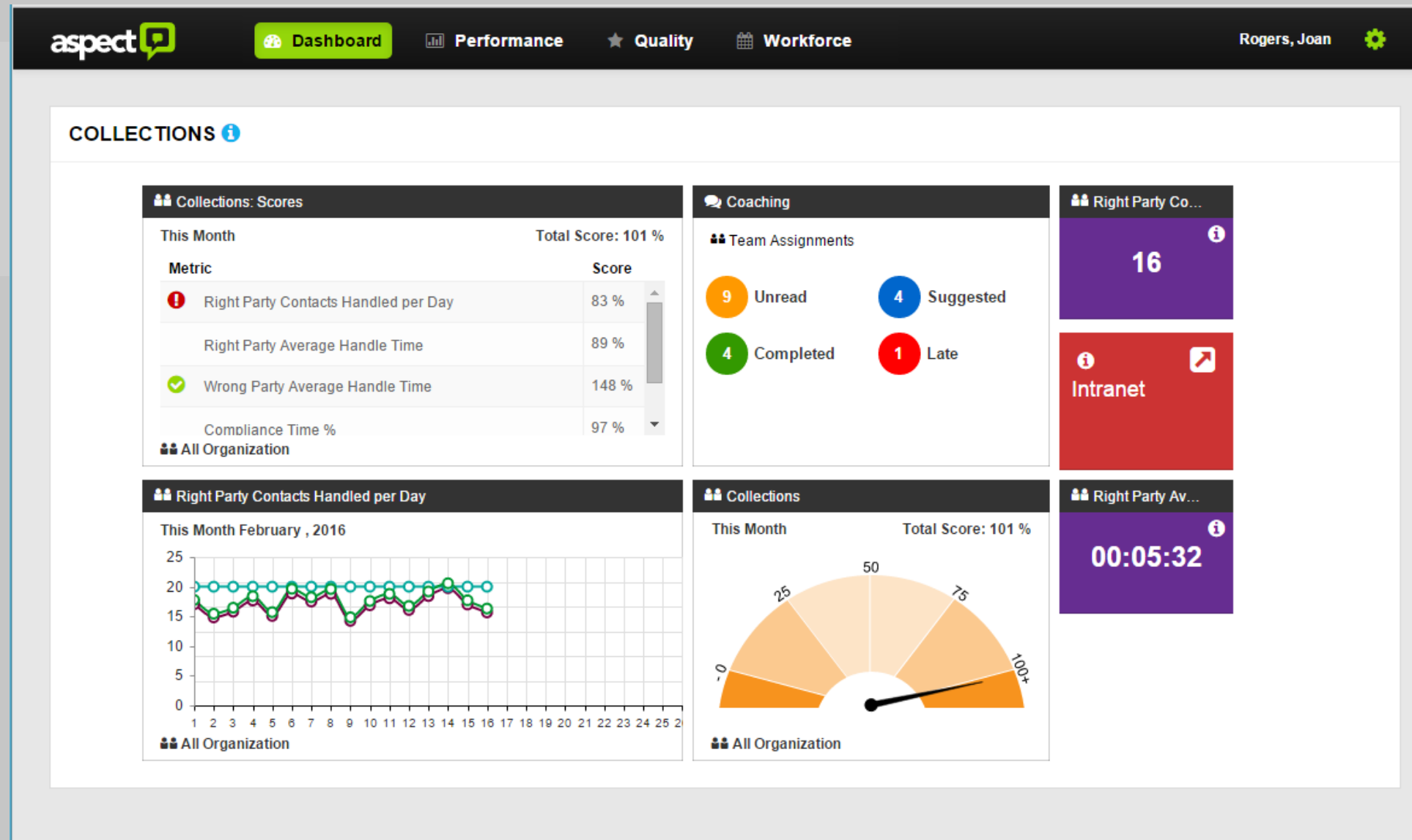
► Business Unit Performance

- Metrics focused on your business & operational drivers
- Combined metrics from many relevant sources
- Budget Reports / Cost per call
- “One version of the Truth”

► Automated Operational Reports

► Easy Drill Up/Down Controls

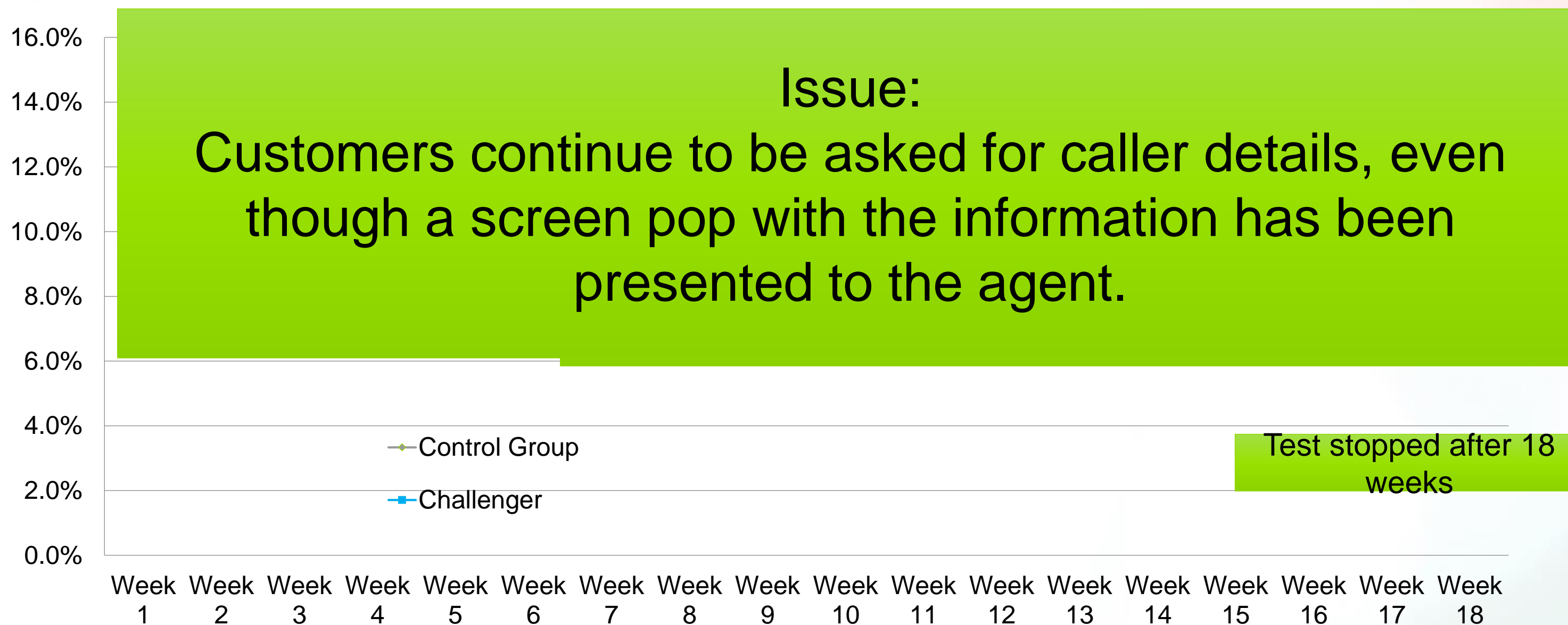
► Process for Driving Improvement to Meet Key Goals



CUSTOMER SUCCESS STORIES



USE STUDY - AGENT BEHAVIOR CHANGE



PERMANENT AGENT BEHAVIOR CHANGE

After the challenge, the groups were no longer actively tracked. However, the information was revisited after a year.

The results showed permanent improvement

CASE #1 - VERITCAL: TELECOM (VOICE/INTERNET/CABLE)

- ✓ Northeast – competing against Comcast, AT&T, others
- ✓ Sales, Services, Outsourced Agents
- ✓ Differentiate through superior Service

- ✓ Service Agent Challenges:
 - ✓ Coaching off the same old metrics, not relevant
 - ✓ No input on goals and consequences

- ✓ Sales Agent Challenges:
 - ✓ Commission information not timely
 - ✓ Commission calculations labor intensive to calculate
 - ✓ Reduced flexibility
 - ✓ Last agent to touch the order got all the credit



SOLUTION

- Adopted a Performance Management system and culture
- Technologies needing integration:
 - ACD, WFM, Quality, CSAT, ICOMS CRM
- Key Capabilities
 - FCR Reporting with drill to call
 - Automated Ranking Insight
 - Integrated Coaching process
 - Automatic Daily Commission Calculations
 - Work-Order Level Commission Credit
 - Automated management dashboards - available on mobile devices
- Key cultural shift
 - Daily attention and ownership of performance throughout
 - Joint agent / management teams reviewing new quarterly goals



BENEFITS

- ✓ **41 point increase in NPS**
- ✓ **15% Improvement in Quality**
- ✓ **50% Reduction in Attrition**
- ✓ **8% Revenue Growth**
- ✓ **Sales Agent Performance – 11% Increase in Upgrade Revenue**
- ✓ **3% Improvement in Productivity**
- ✓ **25 Sec Reduction in Wrap and Hold Time**



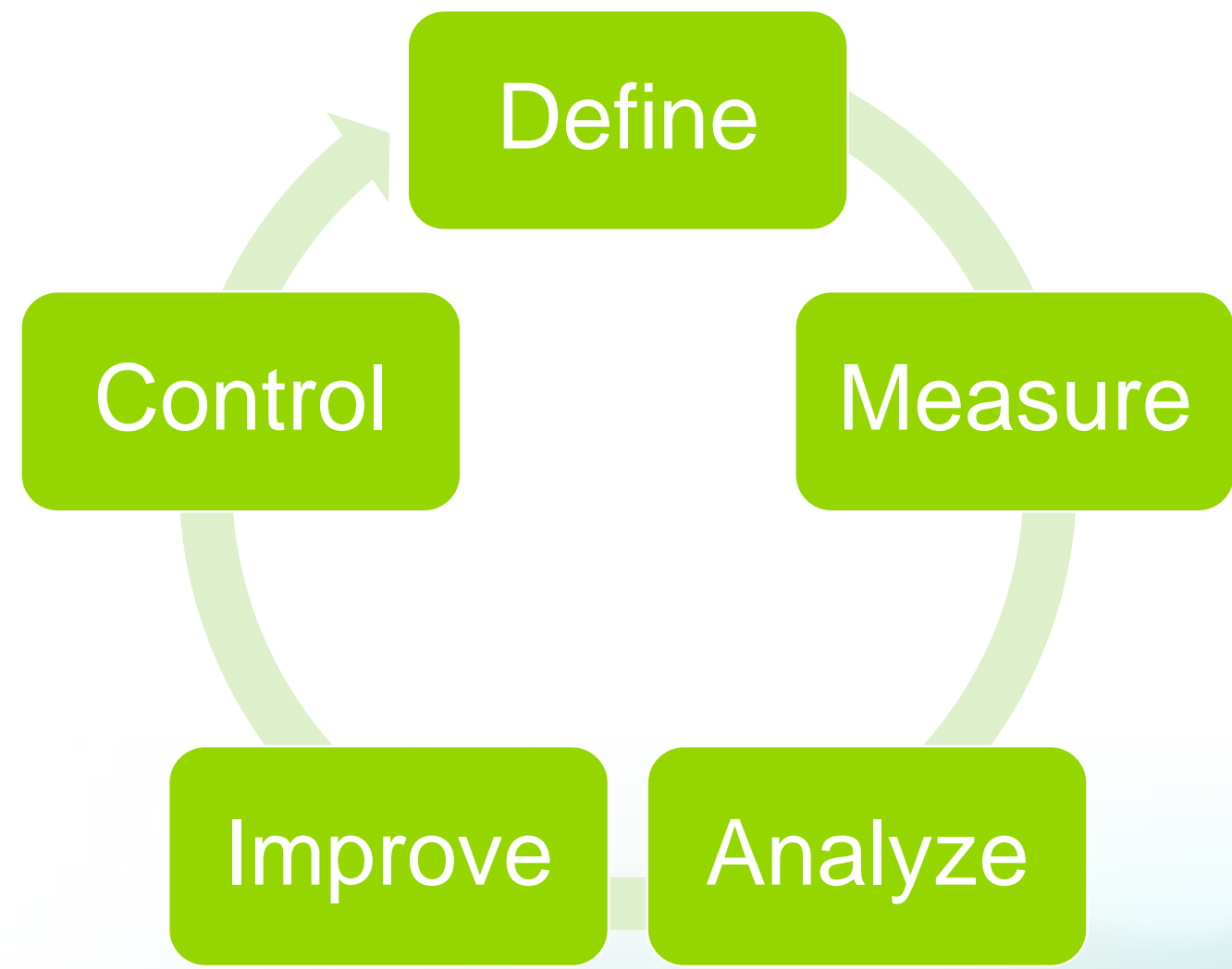
CASE #2 - ONLINE RETAILER

- 150 + websites for different products
- Business Challenges:
 - Volume up 60% YoY
 - Manufacturer offers caused intraday spikes
- Management Challenge
 - Always playing 'catch-up'
 - Couldn't make informed intraday adjustments
 - Corporate Reports too late to be actionable
- Sales Agent Challenges:
 - Huddle meetings didn't maintain focus through the day
 - Unengaging environment
- Service Agent Challenges:
 - Inconsistent treatment across supervisors



SOLUTION

- Adopted a Performance Management system and culture
- Technologies needing integration:
 - On premise ACD, Hosted eMail & Chat, WFM, Quality, Oracle CRM
- Key Capabilities
 - Near Real-time business dashboards
 - Budget vs Actual, Cost per Contact
 - Sales Contests – Hourly, Daily, Weekly
 - Root cause analytic insight
 - Brand & channel analytics
- Key cultural shift
 - Highly engaged sales teams
 - Satisfied service agents



BENEFITS

- ✓ **Sales Agents**
 - ✓ **12% increase in Sales Conversion**
 - ✓ **From 19% to 51% in the middle tier conversion rate**
- ✓ **Service Agents**
 - ✓ **6% Reduction in Average Talk Time**
- ✓ **Operations Benefit**
 - ✓ **\$75K in annual savings in automated reporting**
- ✓ **Bottom Line Impact**
 - ✓ **5% increase in Care Center contribution to Gross Revenue**



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Thank You!
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