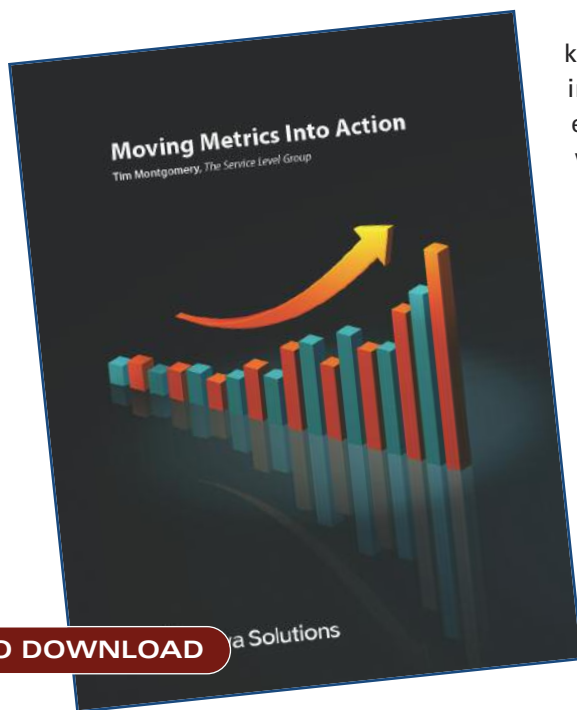


## Metrics: Expanding Perspectives to Increase Effectiveness

BY TIM MONTGOMERY

*The following is excerpted from "Moving Metrics Into Action," a white paper by Tim Montgomery, founder of The Service Level Group, which re-examines standard internal metrics with an eye toward shifting the focus from numbers to behaviors.*



"Good customer service is more important now than ever" is a headline that has been used many times over the years to help get companies to realize where they need to focus.

By now, I think we all

know that good customer service is a necessity in every industry and is always important. What continually evolves is how customers define good service and the ways they tell each other about it. The Internet has given us a new vehicle for sharing praise and disappointment for companies with which we interact. Online forums and shopping Web sites have hundreds of ratings, comments and results — and many are focused directly on the service provided. Today, that one exception that falls through the cracks and upsets the customer can become the documented example that thousands of people read and consider prior to choosing to do business (or not) with a company.

So, is it really true that it's more important now than ever? I think it's just the opposite — anything that's just "OK" puts you at risk. Companies now have to be looking for new ways to continually raise the bar and provide experiences that make customers proud of their decision to do business with them — and that compel customers to tell others about it. Negative

comments posted on the Internet can bring a company to its knees; positive comments can take your organization to the next level. Your customer service today must be so good that people are happy... and willing to tell everyone — whether they know they're telling thousands or not.

Contact centers are at the heart of the customer service experience. The best organizations have developed new ways to leverage their contact center as a true competitive advantage. In the past, companies could differentiate themselves from the competition with their customer-facing technologies — the Web, speech, routing, etc. Nowadays, even the smallest organizations can make their systems act just like that of the big enterprises — the playing field is a whole lot more equal.

The real differentiator between companies is the service they provide on every interaction and the impression that is left with the customer when they hang up the phone. In contact centers, our technologies provide a tremendous amount of data, and the best organizations are finding new ways to use this information to transform the business.

The data we get is often transformed into metrics that we use to help us validate, change, improve and enforce. What often gets lost is that data and metrics are simply indicators of needs or behaviors... and if we spend our time trying to change the metrics, the needs and behaviors are never moved in the way they should be. What follows are some new ideas on how to help your organization refocus its view of metrics, find new ways to funnel leadership influence, and develop plans for continually improving service in the contact center.

**REVISITING ACCESSIBILITY OBJECTIVES**

Just about every organization with an automatic call distributor (ACD) also has some time-of-accessibility measure — service level, average speed of answer, abandon rate, etc. These measures are important to contact center leaders and are often

what we look to in determining what to change in our organization. Just like with how most view customer service, it's often difficult to separate the internal needs from what it means to the customer. What follows are three views of accessibility objectives: How companies traditionally view them, and two new, more effective ways.

**The Traditional View**

Accessibility objectives are often viewed from the company or department perspective with a very inside-out focus. In many cases, those tasked with responsibility for meeting the objectives had little input into the development of the goals, and their understanding has been passed from previous leaders. Some of the common internal views of accessibility objectives include:

> **HOW FEW PEOPLE DO I NEED TO STAFF?** Many times we make decisions with the end result in mind — How many people do I need to be successful? or How close can I cut it without missing the mark?

> **WHAT'S IT GOING TO COST ME?** Although most contact center leaders know the value provided to customers, it's often a difficult thing to quantify. Without the value buy-in from other departments, the focus becomes cost, and contact center

leaders are forced to think of service from a minimum expectation perspective.

> **MEETING MINIMUM EXPECTATIONS IS MANAGING THE CONTACT CENTER.** With so much focus on accessibility metrics in a contact center, leaders often find themselves so consumed with the numbers that meeting them is all about.

> **SOME DON'T EVEN GIVE US A CHANCE.** When setting metric expectations, many times centers begin to blame the customer for things like hanging up too quickly, and begin to adjust the excuses out of the metric.

> **ZERO ABANDONS IS AN UNREALISTIC EXPECTATION.** Abandons are such a misunderstood result that we end up creating excuses and rationalizations when we see them on a report.

**Refocusing the Organization**

While the accessibility objectives and their corresponding goals are often predetermined, contact center leaders can refocus their organization to gain a better connection between the accessibility goal and the customer. Doing this requires leaders to rethink everything they know about their accessibility metrics and look at what it really means to the people they are there to serve. Because the accessibility metrics have become so engrained into the day-to-day life in a center, it's often difficult to make this connection. The points below are from the customer's perspective and what accessibility objectives mean to them.

> **IS THE DOOR OPEN WHEN PROMISED?** A service level or average speed of answer objective is the price of admission — if you advertise your hours of operation, you're going to want to have the doors open at those times. Any time there



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is a delay, it's the equivalent of making people stand outside waiting for admission.

> **HOW MUCH OF MY TIME ARE YOU WILLING TO TAKE?** Your accessibility objectives really measure the amount of disrespect you're providing to a customer. When someone says they need service, every second that you make them wait is taking time away from their life.

> **SHOULD I BEGIN TO LOOK FOR AN ALTERNATIVE?** Making people wait on hold in a contact center allows them to reconsider their relationship with

tional standards associated with each objective that make it clear to everyone the importance to the customer and the contact center:

> **IT'S THE PRICE OF ADMISSION.** You cannot succeed in providing centralized contact center support without having the door open when promised. This is something that more customers openly talk about, and it can dramatically reduce the frontline agent's job enjoyment. It's important to understand that it's not a goal — it's one of the reasons contact centers exist — to provide service when

the day, when they have a need. In every contact center, the workload needs to be managed and measured in every interval of every day — that's how the customer expects service.

> **IMPACTS EVERYTHING ABOUT THE PLAN.** If you don't get the accessibility measures managed as they relate to the customer's needs, all of the subsequent activities will suffer. Many contact centers get caught in a world focused on real-time management and recovery, and in most cases, this is self-inflicted. The key is to handle customers' needs when they contact you: If you don't, you lose control of all the subsequent events. This creates further challenges with accessibility down the line, and consequently drives up the contact center chaos factor.

> **AN EARLY SIGNAL OF CUSTOMER FRUSTRATION.** If your customers are hanging up or have to wait, it's a bigger deal to them than it is to those running the department. Making the connection between your accessibility objectives and the customer means looking at the world through their eyes. If they're waiting a long time in line or self-selecting out of line, it means they're not happy. And it's historical — meaning you could have already pushed them over the edge and they won't be coming back.

> **DIFFERENT BASED ON CUSTOMERS AND PRODUCTS.** A one-size-fits-all approach to accessibility objectives is a mistake: Not all customers are the same and your products provide different value. With that in mind, you should have as many accessibility targets as you do customer types and products supported. The customer's expectations are forever evolving, so you'll want to continuously revisit them as part of your planning process.

The best service is that where the customer doesn't have to waste an ounce of energy being engaged in the process — they tell you what they want, and you do it. Sounds simple, but we often make it a lot harder than needed.

the organization. And, with the fingertip alternatives available via the Internet, an extended hold time can result in a new opportunity for a competitor.

> **I'M TOO BUSY RIGHT NOW.** When people hang up, they are sending a message about what they've decided to do instead of waiting — and that is do something else. The message can be as simple as "I don't have tolerance for wasting time" or "I have alternatives." Either way, hanging up after being placed in queue sends a message — one directly from the customer.

### Setting Standards

While looking at your accessibility objectives through different glasses provides a nice perspective, it can leave some of the reasons open to interpretation. Key to getting everyone involved is to set some founda-

their customers want it. Not getting this part right isn't an option and can't be viewed as a daily goal or measure — it's something that must be there, period.

> **IMPACTS EVERYTHING DOWN THE LINE.** When you don't get it right, everything else down the line is impacted and the next customer will also suffer. It's a combination of a vicious cycle and domino effect: The first time you start to lose control, it begins to negatively impact the next one... and those customers who are negatively impacted call back and the entire frustration starts over again.

> **MUST BE MEASURED AND "MANAGED" BY INTERVAL.** Every customer has the same chance to receive the same level of service, regardless of when they choose to contact you. Remember, the customer is in charge. They contact you throughout

## REVISITING QUALITY AND PRODUCTIVITY OBJECTIVES

Because we can measure just about everything in a contact center, we often do — and we also find ourselves converting things into metrics just because we need a way to balance the scorecard. As with accessibility objectives, quality and productivity are developed from the inside out to meet the organization's definition of quality and productivity. Even with the best intentions, these internally focused measures can make the environment a lot more challenging than it has to be. As we did with the accessibility objectives above, following are three views of agent quality and productivity — how companies traditionally view them, and two more effective ways:

From the customer's perspective, it's pretty simple — do what you said you were going to do and make it quick and accurate. Keep it simple for everyone involved and don't waste my time. The best service is that where the customer doesn't have to waste an ounce of energy being engaged in the process — they tell you what they want, and you do it. Sounds simple, but we often make it a lot harder than needed. Many times, the challenges are self-inflicted. Below are some examples of how companies tend to approach agent quality and productivity metrics:

> **IT'S THE RESULTING SCORE ON THE MONITORING FORM.** Quality becomes a number that is an output of an internally designed monitoring form and internally designed point program. And, in a lot of companies, there are people whose job is to do nothing other than keep score against the forms, and quality becomes even more about the resulting numbers.

> **TEAM AND GROUP COMPARISONS OF THE SCORE.** When quality and productivity are focused on numbers, there are new ways to compare results. Companies are often proud of the group and team comparison displays and reports. In some cases, there is internal competition to be better than each other against the internally created metrics.

> **NUMBER OF AUDITS COMPLETED.** A quota approach to the number of audits completed is something that exists in the majority of contact centers — again, with good intentions, but often at the expense of those that really need help in getting better. This approach moves more (and often unnecessary) audit attention to the agents that do a great job of providing wonderful service on a regular basis.

> **HOW MUCH TIME WAS FOCUSED ON CUSTOMER WORK?** Trying to use metrics to ensure people are busy leads to a focus on how much work they are doing. With measures like this in place, centers are continually looking for the definition of "work" and tweaking the inputs to the calculation. As with quality, there are teams dedicated to tracking, trending and updating a number that most working in the center know has flaws.

> **A WAY TO REWARD AND PUNISH.** These measures can be used as punishment or incentives: Either way, they motivate a behavior in agents. In many cases, the behavior that is being elicited isn't in the best interest of the customer, the agent or the organization. Rewards and punishment create fear — of looking bad or getting fired — and result in agents focusing on things outside of their customer service mission.

## LOOKING THROUGH YOUR CUSTOMER'S EYES

As discussed earlier, customers are,

for the most part, simple. And with that in mind, our quality and productivity measures, processes, reports and improvement initiatives should also be simple. It may sound strange, but making it simple is really easy. Just look at your world through the customer's eyes and make the connection with agent quality and productivity.

Start by reviewing the questions that customers ask, and see if they're addressed by your current agent measures and focus. Looking at the world from the customer's standpoint will immediately highlight the opportunities for your current productivity and quality metrics. In many cases, companies discover they've built too many internal perceptions into what is reported as an external view.

> **WAS IT RIGHT AND DO I FEEL COMFORTABLE?** This is the easiest of all. Was the right solution provided? Did the customer feel good at the end of the call? Sounds simple, and it is. Every discussion on quality should include this question: Did you leave the customer feeling comfortable? This is easily assessed, but often overlooked.

> **DO I FEEL VALUED?** At the end of every interaction, the customer asks themselves if they moved forward with a feeling of value. This is easy — did you make them feel good about calling on their terms or did they hang up feeling like they cost you money?

> **DID I GET EVERYTHING I NEEDED?** Well-documented are the companies that don't get it and short-change the customer, leaving them with a desire to contact you again to get the rest of the solution. When customers call back, it's frustrating for everyone — particularly the customer.

> **HOW MUCH TIME WAS TAKEN FROM**

**ME?** In most cases, the customer looks at every interaction from their own time perspective. This isn't a bad thing and is something that every contact center must embrace. When customers are interacting with you, it's their time — and their life — be respectful from every angle.

> **DID I FEEL RUSHED?** You want to take as little of the customer's time as possible, but you don't want anyone to feel rushed and/or leave the transaction feeling like they were an inconvenience.

> **WAS SOMEONE AVAILABLE WHEN I WANTED?** You have to make the connection with productivity and the customer requirement. In real-time contact centers, the customer wants service when they choose. Adherence to schedule is a key indicator of how much you care about being there when the customer wants you to be.

### CHANGE BEGINS WITH SELF-REFLECTION

Moving an organization toward achieving admirable quality and productivity metrics starts with self-reflection. This is often the most painful part of change, and is the thing that can move contact centers to the next level. The alternative views described below are the enablers to change, those things that call center managers can ask their leaders to consider as they interact with their teams. These are simple statements with very powerful outcomes that have the ability to move organizations to the next level.

> **SCORES DON'T CHANGE BEHAVIORS.** Racking, stacking, ranking and displaying — none of these change an agent's desire to improve. In many cases, a focus on the score makes people uncomfortable, leading them to focus on removing the discomfort

by moving the results without considering the customer.

> **TRENDS INDICATE OPPORTUNITIES.** Outcomes are your view into the future, and the only way to make an informed decision is to understand the drivers to the trend. Key is to realize that the trend is driven by something, so the focus should be on something, not the resulting measure.

> **THE GOAL IS TO IMPROVE SERVICE, NOT MANAGE AGENTS.** Often forgotten is the reason we have quality and

behaviors that need to be addressed. When plotted over time, leaders find that most agent metrics are really noise and a natural variation in a process. It is critical to focus on the agent metrics that fall outside of what everyone else is doing — those are the real opportunities.

> **ALL METRICS AND MEASURES NEED TO BE FLEXIBLE AND CHANGE AS OFTEN AS THE UNDERLYING PROCESS DOES.** One thing is certain in a contact center: change. Appreciation of the external changes and the impact they have

## The best contact centers spend less time managing queues and more time managing the customer experience.

adherence measures: It should be more about the customer than the service center. Many times, agent measures become the focus and call center agents and leaders lose sight of the connection with the customer. These are more than numbers; they are a key competitive advantage when fully understood and applied.

> **WITHOUT THE REALITY, THE PLANNING PROCESS IS FLAWED.** Something critical that is missed in most centers is that you must know the reality of the behavior to schedule effectively. Without this knowledge, the schedules will always be flawed and customer service will be a moving target. The key is to get your arms around the reality of the environment — no goals, no desires, no targets. It's all about what's really happening.

> **NUMBERS ARE MERELY INDICATORS OF OPPORTUNITIES TO COACH NEW BEHAVIORS.** The best leaders don't react based on a few metrics — they use them to identify trends and focus on

on the internal agent quality and productivity measures is paramount. Always keep in mind that if the inputs move the agent's expectations, the inputs must change as often as the process that drives them.

### PULLING THE PIECES TOGETHER

Moving metrics into action takes time and a commitment from all levels of the organization. You'll need to connect with external departments to ensure that they have an appreciation for a behavioral-focused performance program that is more closely tied to what the customer has defined as a need versus what the company has developed as measures of success.

The best contact centers know that metrics are simply an indicator of opportunities, and that real positive change happens when leaders focus on the right behaviors that help the voice of your company get better. ●