Call Center Times

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STRESS IN THE WORKPLACE: HOW DOES IT AFFECT YOU AND HOW CAN YOU COPE?

By Peter B. Polatin, M.D.

The workplace has become ever more demanding of our time and effort. With the increased efficiency and productivity brought to us by the computer and communication innovations of recent years, you would think that life would be easier. But we have been carried into an increasingly frantic work-day by the need to master ever more complicated technology; to be quicker, faster and more innovative; and to advance and make more money. There is less time for lunch, for leisure, for family. Even when we are away from the job, we can be reached or hooked into a weekend project by computer and the internet.

With work demands more and more intrusive in our lives, we may experience subtle but progressive symptoms of physical and psychological stress. What is stress? In a more simple life, it is the threat of bodily harm that induces us to a "fight or flight" response. If you are threatened or cornered, either you fight your way out of it, or run away as fast as you can. While being threatened, you start to breathe faster. Your heart races. Your skin becomes clammy or you begin to sweat. You have a feeling of dread or intense anxiety. And you are watching things very intensely, waiting for your moment to break away or strike out. But what if you aren't really cornered in that way? You just have deadline after deadline to meet. Or you have a boss who is continually looking over your shoulder and expecting you to produce. You're not really being physically threatened, but it feels the same way. And you may begin to have the same symptoms.

Stress is also associated with <u>irritability</u>. You are less patient with friends and family, and generally have a "short fuse," so that people start avoiding you or treading very lightly when they are around you. There may also be <u>emotional lability</u>. That is, one minute you're having a conversation, and the next you're crying for no apparent reason, or raging about a seemingly innocuous event.

Stress can cause a <u>disturbance in sleep, appetite, or libido</u>. You might stay up all night worrying about the project that's due in two weeks. Food no longer tastes good, or it tastes too good and you're eating all the time and starting to gain weight. You lose you interest in sex and just don't want to have anything to do with your "significant other," or develop an inability to become aroused or to perform sexually. You may become <u>distracted</u> easily, and lose your train of thought or be unable to complete a project. <u>Concentration</u> may suffer. <u>Memory</u> for recent events become impaired.

With prolonged stress, people may develop a <u>depression,</u> with a feeling of sadness that last most of the day every day, or a loss of any enjoyment in daily activities. They may have thought of death or suicide, feelings of unworthiness or inadequacy, or the conviction that they deserve to be punished for what they consider to be their faults and misdeeds. They withdraw socially and may become functionally impaired so that they are unable to work.

Many <u>physical illnesses</u>, such as asthma, hypertension, peptic ulcer disease, irritable bowel syndrome, and urticaria (rashes) are precipitated by or worsened by stress. When you go to the doctor for a cure for bothersome physical symptoms, the last thing you want to hear is "try to relax," but it is frequently your general physician who picks up the fact that you are under stress, because he understands that the relationship between the mind and the body. However, equally true these days is the fact that most physicians are also under stress because they need to see larger numbers of patients in a clinic or office, and don't have time to fully explore with you what is going on in your life.

What can you do to deal with stress? First of all, you need

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to recognize the symptoms, as noted above. Then, you should try to identify the specific stressors. Is it the workplace, or some other part of your life? Is it the constant deadlines, or the hours? Is it your supervisor or your co-workers? Or is it the job itself? Are you happy doing what you're doing? Some things you can change, other things you just have to live with. But it's important to know exactly why you are experiencing stress.

Once you have identified the stressors, you need to try to decrease your reactivity. First of all, ask yourself why that particular thing is upsetting to you. Sometimes, just having an internal dialogue can defuse the problem. "I'm upset because I have to get this report out by the end of the day, and it's a lot of work, and I don't think I can do it. But I have to do it, so instead of worrying about it, I am going to do the best I can". Other techniques may also be useful. Distraction is accomplished by blocking any thoughts about the stressful event, and instead focusing your mind on pleasurable things, such as a day at the beach or a good movie you saw recently. Self modulation to induce relaxation involves deep breathing and inducing a calmer state. Ventilation by talking to a close friend, a colleague, or a spouse can help to defuse the immediate situation, and allow time for problem solving. Re-structuring involves re-interpreting the stressful Situation so that it is less immediately threatening. "I have this deadline, but this is also an opportunity for me to demonstrate my competence, and I am going to take advantage of it".

If coping strategies fail to fully control your stressors, you should consider seeking professional help. Many employers have "Employee Assistance Programs" (EAPs), with counselors available to help employees deal with stress. If you have an insurance plan, look for a list of therapists in the directory. It doesn't have to be a psychiatrist, unless medication is required. A psychologist, licensed professional counselor (LPC), or social worker may be competent to help you get your stress under control. Biofeedback, relaxation training, cognitive-behavioral therapy, and psychotropic medication are all potentially useful, short-term techniques to resolve symptoms of stress.

One thing not to do is just live with it. If you are becoming incapacitated by symptoms of stress, you must take charge of your life and get it under control. If you remain passive, you won't get better, and you might get worse. ■

Contact Center Coaching Best Practices: Top Lessons from Top Coaches

By Dina Vance
Vice President and Contact Center Practice Leader
Ulysses Learning

Which contact center coaching practices work best? Why do some practices work even better than others? Which practices appear to have little, if any positive impact on performance? These were just a few of the questions discussed at Ulysses Learning's most recent Master Coaching Best Practices Forum.

Over 45 coaches from leading contact centers in North America were on hand to share their coaching triumphs…and challenges. At the end of the session, these executives agreed on which 10 coaching best practices had the greatest impact on helping their contact centers achieve measurable and sustainable business results. Here's an inside look at the lessons learned and insights gained.

Top 10 Coaching Best Practices

#1 – The Master Coach

The group agreed that having a Master Coach is an important part of their formula for success. A "Master" Coach is an individual who is ultimately accountable for ensuring all aspects of the coaching process are implemented effectively and consistently within the call center. This typically includes: monitoring calls, choosing pivotal behaviors on which to focus, conducting "calibration" sessions that focus on improving or reinforcing the coaching process, and identifying and keeping track of performance trends as results are measured over time. Another important function of the Master Coach is to shadow or observe other coaches and coach them as well.

The Master Coach position reports to senior management. This person is an advocate for coaching, regularly and consistently sharing progress results and bringing issues to the forefront. They are very comfortable working with all levels of employees, but work mostly as a coach to other contact center coaches. The ratio of Master Coach to coaches that appears to work most effectively is 1:10.

At the end of the day, the Master Coach is responsible for helping hold everyone accountable to the coaching process. That means they have to resist the urge to let scheduling conflicts, high call volumes and daily fires pull them off task. They focus approximately 50% to 75% of their time on coaching. And, most importantly, they have the support of the senior most managers in the call center…and the company. The role of the Master Coach is clearly viewed as a strategic imperative.

#2 – Getting to 50% Plus Coaching Time

One of the biggest hurdles contact center managers and supervisors face is getting to a point where they can spend 50% or more of their time coaching employees. This is the level of commitment many of them have found is needed to ultimately raise and then sustain contact center performance improvement.

The three elements needed most to accomplish this goal are: 1) adherence to the right coaching process; 2) senior management support; and 3) time.

Organizations that use coaching to achieve improvements in quality, productivity and customer retention, follow a simple four-step process. First, they provide reps timely "side by side" coaching immediately after the call; second, they focus on one pivotal behavior to ensure the greatest impact; third, they provide constructive feedback; and fourth, they provide the feedback quickly, which means in 60 seconds or less (this can be done…with the right method).

An important point to make is that everyone who coaches performance, from peer coaches and QA specialists to team leaders and supervisors, follows the same coaching process. Consistency is absolutely vital.

At the heart of this process is what we call *Focused Feedback*.[1] *Focused Feedback* is specific, targeted feedback around one "pivotal" behavior that has the greatest impact on the outcome of the call. It's based on the notion that more often than not, coaches tend to overwhelm their representatives with too many behaviors to change all at once. However, it's far more effective to coach the representative on only one specific, pivotal behavior that was either the make or break of the call.

There are many tangential benefits to the process just described. Specifically, the coaches we've talked with find that providing one-minute *Focused Feedback* helps accomplish several goals. First, they have more performance-oriented coaching interactions each day; second, they are immediately and positively impacting customer satisfaction with every coaching session; and third, reps are more likely to demonstrate the right behaviors more consistently because coaching is done with greater frequency.

The idea behind this last point is this: if reps know they are infrequently monitored and only participate in one, 20 to 30 minute coaching session every two weeks, they will be less likely to demonstrate the required behaviors that impact customer satisfaction, productivity and profitability the most. They will be more likely to demonstrate the appropriate behaviors right before they are to be monitored and coached, which, in most cases, does very little to move the needle on customer satisfaction.

The second element that's needed to get to 50% plus coaching is to build it into the job description for your coaches and hold coaches accountable. Usually this means that other tasks need to be removed, re-allocated or re-aligned. What's most important here is that coaching is recognized by senior management as a crucial part of a manager's or supervisor's job and it's not simply tacked on to an already onerous list of responsibilities.

Finally, the third element is time. Recognize that getting to 50% plus coaching does not occur overnight. There are some weeks that may be difficult to get to even 10% coaching, but that's okay. It's important to not get discouraged, be patient, and continue to make coaching a priority. For many organizations, it can take up to 12 months to inculcate a results-oriented coaching process into the contact center culture. And the payoff is certainly worth the effort!

[1]*Focused Feedback*™ is the coaching model featured in Ulysses Learning's ***CoachingMentor***® which is a part of the Ulysses ***CallMentor***® sales, service and coaching training system.

#3 – Goal Setting and Pivotal Behavior Coaching

The coaches who participated in Ulysses Learning's Master Coaching Forum also noted that in addition to providing reps immediate, side-by-side coaching that's provided in one minute or less, it's equally important to set performance goals for reps and provide more lengthy coaching sessions on a quarterly or monthly basis.

What's the appropriate length of time for these sessions? Surprisingly, the quality of the session is not directly tied to its length. A 15-minute session can be just as effective (or even more effective) as a 60-minute session if it's focused on a pivotal behavior.

Again, running through a laundry list of areas in which the rep needs improvement is oftentimes counterproductive. Research has proven that the best route to take is to look at the one behavior that has the greatest impact on improving the rep's overall performance. That's where you focus your attention during your coaching session.

What we have found to be particularly effective is a *Master Coaching Log*. This log features a series of listed behaviors that, when demonstrated consistently, help contact center reps achieve optimal on-the-job performance.

While coaches are monitoring and observing calls they use this form to note the absence or presence of critical behaviors and whether they reinforced, refined or redirected the most pivotal of those behaviors in their 60-second coaching sessions. Then, as they are prepare for their more formal monthly or quarterly coaching sessions they review the forms to note specific performance trends, including areas in which reps are struggling most or doing particularly well.

One thing we have learned through our work with leading contact centers, is that the monthly or quarterly coaching sessions are a essential part of the process. Employees want and need one-on-on coaching time that is away from the phone. In focus groups we have found that they are actually disappointed if a session is canceled or pushed back because their manager is just too busy.

Helpful tools such as the *Master Coaching Log* combined with providing reps *Focused Feedback* around one pivotal behavior make these coaching sessions easier to plan and execute, and further add to the overall credibility and impact of the process.

#4 – Weekly Calibration Sessions

Weekly calibration sessions are for coaches to discuss, as a group, what's working with the overall coaching process and what's not. The weekly calibration session is not an event. It's part of the fabric of everyday activity in the contact center.

In contact centers that schedule several calibration sessions a week, individual coaches know that they need to attend one or two of those sessions to keep themselves up-to-speed on key issues and trends that are being identified as a result of coaching representatives. While this includes some operational issues, the majority of time is spent sharing coaching success stories, as well as challenges. The weekly sessions help coaches reinforce and redirect some of their own coaching behaviors that, in turn, strengthen and build best practices in the contact center. They are also helpful in identifying training needs for coaches as well as reps.

Typically, the calibration sessions are facilitated by a Master Coach who has extensive coaching experience and is particularly effective at keeping the sessions on track. Contact centers participating in Ulysses Learning's master coaching forum voiced their approval of having a Master Coach who is intimate with their center but works on the outside. This increases the odds of keeping the calibration sessions a priority as internal Master Coaches can oftentimes get easily distracted with other issues that fight for their attention and limited time.

#5 – Monitoring Forms…Friend or Foe?

Monitoring forms and coaching go hand in hand. But are these forms friends…or foes? They can be both, depending on how they are used.

Monitoring forms are particularly effective when they ultimately measure what is important to the customer…specific rep behaviors that lead to customer satisfaction and are measurable and observable.

Another critical element of the monitoring form is that it's simple to use and not overwhelming to either the coach or the rep. The form should outline only those behaviors that are most critical. Monitoring 10 to 15 behaviors is too much for any one individual to effectively accomplish. By focusing on too many behaviors, usually the one that is most pivotal and important from the customer's perspective is overlooked or not appropriately addressed.

Recognize that it's okay to change your monitoring form, if needed. Just know that change for change's sake can hamper, not help, your monitoring and coaching process and can confuse agents unnecessarily.

However, if you are getting feedback from your agents and coaches that the monitoring form is not supporting your coaching process and helping you measure your customer experiences, it's a wise move to investigate what might need to be refined. And, while a committee decision is desirable, make sure the individual ultimately responsible for changing the form is someone with extensive front-line experience.

One last point on this topic – when constructing a monitoring form, be careful not to get caught up in semantics. One organization spent six months fine-tuning its monitoring form. They argued over what words to use so much so that they lost focus of what they were really trying to accomplish.

According to a recent research study by ICMI, there are three things that customers really want: 1) to be handled in a timely fashion; 2) to get the answers they need; and 3) to be treated with consideration when they call in with a question. The behaviors necessary to support these customer needs are the behaviors you want on your monitoring forms.

#6 – Measuring Success

While we all recognize the importance of measuring success, *how* do we most effectively measure success in our contact centers? The greatest challenge, according to the coaches we have worked with, is creating a scorecard that measures both long- and short-term success.

One balanced scorecard approach is to identify specific measurements for both agents and supervisors and include this "voice" of the employee as one of your success measures. The supervisor is scored on whether or not they achieved their targeted number of employee coaching sessions – both formal and informal – as well as whether or not they achieved their goal of 50% plus coaching. Employee attrition is another important measure.

Agents are similarly scored on feedback received from customers. And, from a short-term as well as a long-term perspective, customer feedback, specifically achieving "top box" ratings, helps build customer loyalty and helps influence "net promoters" or customers who tell other people about the great services and products they received.

For sales oriented contact centers, sales conversion ratios, sales by brand, and product returns are all key indicators. Product returns are particularly meaningful. Some organizations might achieve high levels of sales with equally high levels of product returns or account closings. This typically points to a sales process that perpetuates a "pushing product" mentality and does not focus on providing clients the right solutions to their needs.

The most meaningful measures are those that are realistic and can be captured in real-time, or as close to real-time as possible. Realistic, real-time data helps you keep on top of your operation, making necessary refinements before customer relationships are adversely impacted or lost…and identifying appropriate behaviors so that they can be redirected or reinforced.

#7 – 30-60-90 Day Follow-Up

There is a well-known quote that goes "What you inspect, is what to expect" and, as it is often phrased "What you don't inspect, you won't get." That's why, when developing new skills or processes in your organization it's absolutely paramount to conduct formal follow-up sessions in addition to the regular coaching, scorecard, and calibration sessions already discussed.

The fact remains, that when it comes to developing a new skill, it takes between six to eight weeks for behaviors to change and become habits. Those organizations that have instilled new training and coaching processes find this statistic to be accurate and have also found that having a formal, 30-, 60-, and 90-day follow-up helps them accelerate behavioral change and achieve targeted business results more expediently and cost effectively.

What needs to be measured in these follow-up sessions is the degree to which people are demonstrating their new behaviors and adhering to (and are comfortable with) the new coaching process. After 30 days, small improvements are noted but people are typically feeling a bit awkward with the process. After 60 days, their comfort level is increasing; after 90 days, they are beginning to see real behavioral change and an upward trend in the business measures they identified as key success indicators before they rolled out the new training and coaching process.

#8 – Accountability Measures

When you are developing new skills or starting a new process, often times, it's easy to lose focus as your organization works to get all the pieces to fit and flow together. Also, over time the processes have been tweaked and refined to the point that they have fundamentally changed and the people accountable for various parts of the process can change as well.

For example, let's say when the new coaching process was installed there was a decision made that each coach would coach periodically throughout the day. However, in reality that created a situation where there were times that there were no supervisors available to handle urgent requests or questions because they were all engaged in coaching at the same time.

In refining the process, a decision is made to assign certain coaches to monitor and coach calls in the morning and another group to coach calls in the afternoon. This way, managers are always available to support employees not being coached.

Accountability also factors in when you are identifying common training needs and logistical issues that come up during the course of working with the new coaching process. You need to determine who will be accountable for tracking, managing and handling these needs and issues as they arise.

Also, it's important to know who is accountable for keeping track of expectations and tracking the big picture improvements as they occur over time. For example, early on in the coaching process, coaches might struggle with giving *Focused Feedback* in a minute or less. Over time, they become so comfortable with the process that they could train the process themselves. Who is tracking this evolution and sharing it with others so that they, too, can be inspired and motivated to do the same?

As we all know, without accountability the things we want to occur won't. Take the time to make sure that you build accountability into each element of your coaching process and recognize that who is held accountable for what will, in all probability, change as your evolve your process over time.

#9 – Sharing Testimonials and Publishing Results

A close colleague of mine says "Adults learn best from their own data." There is a tremendous amount of truth in this statement. All the experts in the world can speak to a certain truth, but it's not until an individual has experienced something or heard it from a close friend that it truly resonates with them.

This is true for organizations that are creating change, learning new skills and implementing new processes – like the coaching process we described earlier in this article. Sharing success stories among agents and coaches can go a long way. Sharing testimonials from customers who recognize and appreciate the improvement in service is also very compelling. Publishing results – both qualitative and quantitative – is an important step to creating and keeping the momentum going…as long as the results are meaningful. (Refer to Best Practice #6 – "Measuring Success.")

Make sure that you are publishing results that speak to the cultural change taking place, not just the improvements in average handle times, calls in queue, abandonment rates, etc. And don't just communicate results in writing, share "live" stories at informal and formal meetings to create a memorable impact on people that can often times be difficult to create in writing. Also, show how your rewards and recognition tie back to the coaching and measurement process and share this information not only within your contact center but, where appropriate, company wide so you can all leverage best practices and learn from one another.

#10 – Celebrate Small Wins

Why celebrate the small wins? That's what keeps the momentum going and gives people something positive to talk about each and every day.

Many of the coaches participating in our master coaching forum noted small wins or performance improvements after only two weeks of implementing the new training and coaching process. Even though it was too early to declare victory, the improvements were exciting. They and their reps discussed them in the break room and shared them at informal meetings.

Celebrating small wins helps build morale, creates consistent behaviors and reminds everyone what the effective behaviors are.

It helps make the training and coaching process a natural part of the everyday culture.

What happens when you don't take the time to celebrate small wins? People start to feel unappreciated. They become less open to sharing what's working (and what's not) because they don't feel the effort will be recognized. Celebrating small wins is a powerful motivational tool that takes little a little time and effort and can reap substantive rewards such as increased productivity and effectiveness.

A Final Note…..

Going forward, coaching will become an increasingly important activity and vital function in our contact centers. For many, it's the glue that holds the entire business together.

The majority of the best practices noted in this article are universal. I hope you consider them as you evolve your contact center further.

However, it should be noted that some of these best practices are universal only among clients of Ulysses Learning. This is due to the unique nature of Ulysses' ***CallMentor***® Learning and Performance Improvement System which builds Judgment@Work™ skills – decision making and advanced interaction skills – and features simulation-based service, sales and coaching training, intelligently blended with facilitated group exercises, master coaching, and performance improvement services.

If you have any questions or would like to learn more about Ulysses Learning's approach to helping contact centers achieve measurable and sustainable results in service, sales and coaching, contact me at 800.662.4066 or dvance@ulysseslearning.com. Or visit the Ulysses website at www.ulysseslearning.com.

About the Author…

Dina Vance is a widely respected thought leader on developing and leading contact center staff and a pioneer in improving performance of financial services contact centers. Ms. Vance was responsible for the ground-level start up of two financial services contact centers before she moved into a consulting role where she also managed the call center division for an international consulting and training organization. She currently leads Ulysses' Contact Center Practice and serves on the executive boards of the Call Center Industry Advisory Council (CIAC), American Bankers Association (ABA), and Call Center Networking Group (CCNG).
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DMEC INCIDENTAL ABSENCE SURVEY REVEALS GROWING PROBLEM, INADEQUATE RESPONSES

Incidental absence - unscheduled, illness related employee absences of one to five days - accounts for 30%-50% of all lost work days. According to the results of a survey released today by the Disability Management Employer Coalition (DMEC), corporate managers know incidental absence is a growing problem, but lack the resources to effectively address it. Gallup estimates incidental absence costs American employers $300 billion a year in lost output and related costs.

"This the first survey of its kind to determine both the awareness and ability of corporate managers to address the growing incidental absence problem," said Sharon Kaleta, DMEC's CEO. "The results shine a light on significant costs managers are often ill-equipped to reduce."

Awareness of Problem

According to DMEC and Nucleus Solutions, which organized and analyzed the scientific survey, there is growing awareness of the growth of incidental absence in the workplace:

- 30% believe incidental absence is increasing; 4% believe it is decreasing
- 90% believe incidental absence is a manageable problem
- 60% indicate upper management recognizes incidental absence is a significant drag on productivity

Lack of Resources

Along with the growth in awareness of incidental absence as a significant cost center is recognition that managers often lack the tools to address it:

- 13.5% indicate incidental absence ranks in the top 30% of HR priorities for senior executives;
- 25% are increasing their budget to control incidental absence;
- Of 30 potential solutions to reduce incidental absence, only 16% of the solutions were used by more than 80% of respondents.

Survey cont'

Survey participants

200 human resources and operations managers from 31 industries were surveyed:

By Industry

- 24.9% insurance/third party administrator (TPA)
- 14.3% health care
- 10% manufacturing
- 9% government
- 7% energy
- 6% education

By Firm Size

- 41% employ fewer than 5,000
- 25% employ from 5,000 to 20,000
- 21% employ 20,000 to 50,000
- 8% employ more than 50,000

"Incidental absence is a powerful way to measure the degree of employee commitment to a company and its goals," said Sharon Kaleta, DMEC's CEO. "Now that the labor market is improving, many employees may go from taking a day off to changing jobs. Reducing incidental absence—which means establishing a present and committed workforce—is a critical component to maintain the productivity gains of the past decade."

A formal presentation of the survey results will be presented by Sharon Kelata, Co-Founder of DMEC and Dr. Edward Anderson, Co-Founder of Nucleus Solutions, on July 18 at the 2004 DMEC Annual Conference in San Francisco, California. As a result of this survey, DMEC will develop practical solutions for this growing problem of incidental absence for its members.

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CALL *PATH* CONTROL means ***Saving Time***

Countless call center dollars can be saved every year if call agents learn to ***control the path*** of the conversation with the customer. In your training sessions, you can teach the agents special call control and discovery techniques. These skills will enable the agents to avoid dead air after a presentation or having to listen to long winded customers with time consuming descriptions of problems in order to handle customer service request call.

The ability to control the path of a call will:

Yield clearer and more concise two-way communication.

It will shorten the length of time necessary to serve customer's needs and

Provide a natural lead in to up-sell and cross-sell opportunities.

Call Path control. In customer service, the agent's job is to quickly determine the customer's need and take the appropriate actions to solve a problem or fulfill a request. In sales, the agents job is to gently discover the prospect's needs or wants. The information gained from the discovery process becomes the framework around which the agent can build a sales presentation targeted to fulfill the specific need rather than pitching everything the company has, hoping something will catch the prospects attention.

Teach Call *Path* Control First.

If you are designing a customer service or sales presentation training course, here are some simple and easy to follow guidelines for teaching Call *Path* Control.

1. **Remind your trainees that the "person who is asking the questions is the person in CONTROL."**

This means control the *path* of the conversation and NEVER control the customer. The first goal of the conversational consultative selling is to provide a way to ask the right questions without offending the customer and still keep control of where this telephone call is going. This mean that the sales person or customer service agent is the one who should ask the most questions.

In call centers where the focus is on Customer Service the agents have a tendency to *respond* to the customer only - leaving dead air, and having no control. The second important goal of the conversational consultative selling process is to be sure that the question you ask is worthy of the customer, the agent and the company's mission.

2. **Write Questions that are intelligent and have the customer's needs in mind.** All questions must be written in a way that make the customer "feel" right to respond to them. The agents want to establish a relationship with the prospective customer or keep a relationship with a present customer for the long term. Make sure your questions have no hint of sarcasm or insult. Questions that insult like "You would like to save money wouldn't you?" can seriously damage the life time relationship with the prospective customer. This type of question always irritates the customer and sounds like it came right out of the "50's, 60's, or 70's" sales training.

The intelligence gathering process needs to be performed with ***intelligence***, and that means design discovery questions to fit what you already know or can find out about the prospect's plans, needs or desires. After you find out what's needed or wanted, don't be afraid to let the prospect know what you can do to support that need. Ask: "Mr. Jones, Since you need xxxx , and we have excellent products to fill that need. **Shall we send it right out to you?"**

3. **Soften every question with a statement of interest or information in front of it.** Give the customer time to think and prepare a response to your next question. Create a "safe" environment with your questions. Make sure the trainee understands that the requirement is to control the ***path of the call*** and not *control or manipulate the customer*. If you will soften the question with a phrase or sentence in front of the question it does several " good things." First it gives the prospective customer time to prepare the answer to the question. Second the statement can be used to show interest in the subject the customer wants to talk about.

Example: When the agents wants to know if the customer can afford the price of the product.

DON"T SAY: We can now get you that product reduced for $199 to $179. (No question) Assuming the customer will jump at this chance. Or "Would you like to save $20?" Or "How would you like to save money on the last price we offered you?"

SAY THIS: Mr. Jones, You had shown some interest the last time we spoke and the price at that time was $199. We have a new version of that same product that has been reduced to $179 saving $20 from the older model, would that price range work better for you?

Teach what you need to LEARN - Practice WHAT YOU TEACH.

When you want to train others to Control the *Path* of the Call you will need to learn to do it yourself. The rewards for you will be you will have better Control of the Path of the Training and the Bigger reward will be when the agents you train have much higher results. **This will make you feel very good because you taught the agents a communication skill that will work in all of their lives.**

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Survey Channel Slamming: Common Sense in Surveying isn't so Common

By Dr. Jodie Monger – President Customer Relationship Metrics, L.C.

When trying to provide the best service to your customers, it is not a good idea to create a disservice by forcing all customers through one communication channel. That is why contact centers provide multiple points of access to improve the success of the interaction. Multi-channel integration is something that almost all contact centers must now deal with. By providing several channel options for the customers, it reflects that we are in tune with their desire for high-, medium- and low-touch customer service interfaces.

We certainly can, and often try to, encourage customers to serve themselves on low touch issues and if done correctly it will not jeopardize customer loyalty. With all of our efforts to reduce cost via high tech/low touch service channels, it is tempting to force electronic surveys on your customers to lower the cost of measuring the Voice of the Customer, no matter how the customer contacted you. And with a multitude of new companies offering electronic survey solutions, the common sense approaches to the science of surveying is being lost in the hype. Beware and be aware that cheap can be very expensive and an 'easy' fix may not provide you with any actionable data. Customer feedback that is gathered by a flawed measurement strategy can easily mislead and ultimately misdirect your service strategy. One of the largest, and most easily avoided, flaws we observe today is Survey Channel Slamming.

In the effort to quantify customer satisfaction, you must not create dissatisfaction by forcing your customers through a different contact channel to measure service. Your measurement strategy must reflect your mission to be customer-focused and to be easy to do business with and that means congruence with the customer-selected channel of communication. If the customer sends us an email, sending a US Mail survey to gather an evaluation of the interaction is Survey Channel Slamming. If the customer called us for service and we send an email survey, this is Survey Channel Slamming. This flaw in measurement must be avoided.

Survey Channel Slamming is dangerous to your measurement program. Ignoring customer preferences can generate a service weakness and may create a source of dissatisfaction; this undermines the validity of the Voice of the Customer measurement program.

Unless you are a company that conducts a significant amount of customer interface electronically, you do not have a comprehensive and high quality list of customer email addresses. Except in the case that you are an online-only company, you cannot assume that all your customers have the ability to contact you electronically. And if this is not the case, you will be missing a large percentage of your customer base if you rely solely on an electronic method for a survey. Customers who call you may not have an email address or do not update their records which generally deters the desire to Survey Channel Slam an email to them to evaluate the service delivered on the telephone call. We cannot manage to feedback collected electronically because the sample is inherently biased. Customers also have privacy concerns about how information will be used, especially email addresses, which may further alienate them or create dissatisfaction with the process and further weaken the measurement program.

The inability to randomly sample from your customer population due to channel selection prevents your results from being generalized from the sample to the entire customer population. If you can't randomly sample from each channel, then don't measure at all. Invest your research budget into a program that yields results that are worthy of your management team's attention, one that is statistically viable. Your Return on Investment (ROI) will be significantly higher even though the initial investment may be slightly more.

To best measure the effectiveness of service delivery, an immediate evaluation is needed via your customers' preferred channel. If the customer calls you, conduct an immediate post-call survey. If the customer Emails you, respond with a web-based survey opportunity. To measure the effectiveness of fulfillment issues (or back office work), a follow up, delayed survey is appropriate and, here, the use of a complementary survey methodology would not be considered Survey Channel Slamming. Don't listen to the hype or feel the pressure to utilize an ineffective research program. Determining the method of measurement for each channel should follow the rules of common sense and therefore use multi-channel methodologies.

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NEWS

Teltone Introduces Emergency Notification Solution

Teltone Corporation, a leading provider of enterprise telephony solutions, has announced the release of Notify Express. Notify Express enables proactive announcements to inform key personnel quickly in crisis and non-emergency situations. Notify Express is a second-generation rapid notification solution for contacting people via phone, email, pager, or SMS text message.

“Notify Express is designed from the ground-up as a secure, robust solution, ideal for mission-critical business continuity environments,” commented Debra Griffith, Teltone president and CEO. “The first step in recovering from a minor business disruption or a major emergency is communication. Notify enables fast, efficient organization of response teams.”

Notify Express automates the emergency notification process, providing consistent, clear, and timely announcements. Notify can be used for organizing emergency response teams, employee announcements, activating on-call staff, school announcements, service outage notifications, and military status alerts.

Notify Express includes password verification prior to delivering sensitive messages, to ensure that information is never divulged to the wrong party. In addition, Notify Express requires contacts to accept or reject messages, helping to identify in real-time which individuals are available to help with recovery or crisis management efforts. These security measures ensure that emergency notification campaigns are successful and well organized.

Administration of the Notify Express system is accomplished by an intuitive, secure web-based user interface. A complete notification campaign consists of just four simple steps – import contact information, create a notification message, send messages, and acknowledge receipt. In addition to the web user interface, administrators can configure and launch notification via phone call directly into the Notify Express IVR system.

Notify Express was unveiled today at Contingency Planning & Management (CPM West) in Las Vegas, NV, a tradeshow for business continuity and disaster recovery. For additional information on Notify Express and the Teltone family of rapid notification solutions, visit their website at www.teltone.com or send email requests to info@teltone.com. ■

Indiana Farm Bureau Insurance Turns to IEX to Improve Contact Center Performance

Richardson, Texas- IEX Corp., a Tekelec company (Nasdaq: TKLC) and the leading provider of contact center workforce management solutions announced that Indiana Farm Bureau Insurance has selected IEX® TotalView® SC, the IEX workforce management solution for smaller contact centers, to streamline operations and improve agent performance in

its customer service contact center. The TotalView SC solution provides the same core functionality as the award-winning IEX TotalView Workforce Management solution, but is priced and tailored to meet the needs of centers with fewer than 100 agents. Turnkey installation and training, along with pre-loaded templates, profiles and sample agent records make it easy for smaller-sized contact centers to get up and running quickly, and achieve the benefits of advanced workforce management technology in their operations. “IEX gives us the most options for our money and is a very flexible system,” says Customer Support Service Manager Linda Ellis. “It was the choice that most met our

needs now and in the future.”

Indiana Farm Bureau Insurance is counting on the TotalView SC Adherence Suite feature to help improve their agents’ performance. Combining both real-time and historical schedule adherence functionality, the TotalView SC Adherence Suite allows managers to monitor how well agents keep to their assigned schedules. “Agent adherence can be especially critical in a smaller contact center where individual performance has a larger relative

impact on overall results,” said Debbie May, IEX president. “TotalView SC gives managers the tools they need to improve agents’ adherence to schedules for a more efficient contact center.”

About IEX

IEX Corp., a Tekelec company, is a leading provider of contact center workforce productivity solutions. In existence since 1988, the company has

a long-standing reputation for delivering superior products, quality services, and customer success. Contact centers of all types and sizes, totaling more than 685,000 agents at over 2,600 sites in 34 countries worldwide, rely on IEX solutions to improve planning, enhance performance, streamline tasks and integrate data. IEX sells products and services worldwide through direct sales and select distributors. The company's headquarters are located in Richardson, Texas. More information can be found on the IEX Website at http://www.iex.com. ■

BILL LOCONZOLO JOINS PERFORMIX TECHNOLOGIES AS VICE PRESIDENT OF ENGINEERING

BURLINGTON, Mass. - Performix Technologies, the leading provider of employee performance management solutions announced that William J. Loconzolo has joined the company as vice president of engineering. Loconzolo has been involved in enterprise software engineering and development for more than a decade with such firms as Nokia Corp., TeleGea, and Dataware Technologies. He will serve as the senior engineering officer for Performix.

?Bill Loconzolo brings a wealth of enterprise software experience to Performix,? said Cathal McGloin, the company?s chief executive officer. ?His excellent technical knowledge and team-building skills will help us respond to our customers and speed the development of new software that can take Emvolve well beyond the contact center into a variety of other business functions such as back office processing areas.?

Loconzolo comes to Performix from Nokia Corp., where he served as the senior architect and technical platform lead for a team which was responsible for implementing Nokia?s next generation multimedia messaging service (MMS) server side software platform, a $50 million product line. Before that, he was vice president of engineering for TeleGea, Inc. in Waltham, Mass. TeleGea provides telecommunication carriers with an enterprise software platform for process automation and back office integration. Loconzolo built the TeleGea development team up from the ground up to a distributed team of 40 engineers.

During the 1990s, Loconzolo served as director of software engineering for Dataware Technologies of Cambridge, Mass., a firm that provides enterprise search and retrieval software for Fortune 500 companies and government agencies. At Dataware, he managed the development of the company?s flagship knowledge management product and directed an globally distributed team of 30 engineers, delivering multiple commercial products at three development locations.

Loconzolo is a graduate of Northeastern University with a Bachelor of Science degree in electrical engineering and computing. He is a frequent speaker at industry conferences and has published a range of technical papers on software architecture. He also has two patents pending with the US Patent Office in the area of XML and dynamic credit card security.

Last month, Performix announced it had closed a $10 million round of funding led by Atlas Venture with full participation from existing investors Highland Capital Partners and ICC Software. The company said that the funds would be used to extend its leadership in the contact center arena, where it has a 30% market share, and to fuel expansion into back office and business processing areas.

About Performix Technologies
Performix Technologies is a leading provider of employee performance management software that increases profitability through improved employee performance. The company was founded in Dublin, Ireland in 1998 and now has operations throughout the UK, Ireland, and North America. Corporate headquarters are in Burlington, Mass. The company?s flagship solution, Emvolve Performance Manager, works by integrating statistical information on actual employee performance and applies proven performance management techniques to the data to drive increases in productivity and business performance. Performix Technologies clients include The Co-operative Bank, Intelligent Finance, Scottish Power, Cable & Wireless, AOL, and O2.

For more information, please visit www.performixtechnologies.com http://www.performixtechnologies.com ■

listed in the May/June issue of the publication.

Envision Unveils Multi-Language Versions of Click2Coach

Version 8.1 to be Localized in both German and Spanish; Citicorp to Benefit from German Version

Seattle - Envision Telephony, Inc., a leading provider of contact center software solutions announced that due to strong worldwide interest in the Envision(tm) Click2Coach® solution, it will release Click2Coach 8.1 in both German and Spanish languages. Among its first customers for the German version is Citicorp Dienstleistungs GmbH. Citicorp will use Click2Coach 8.1 to train its agents to provide better-quality customer service. Click2Coach 8.1 is now available directly through the company or its partners in Europe.

Envision's Click2Coach represents a unique approach to improving the effectiveness of contact center agents. The Envision Click2Coach solution includes Envision(tm) Quality Monitoring and Envision(tm) eLearning and is a complete set of training, quality monitoring and evaluation tools to coach agents for success. Click2Coach is the world's first integrated eLearning and quality monitoring solution for contact centers. By automating the coaching process, supervisors are free to focus on one-to-one communications, and agents are empowered to be highly effective, motivated and long-standing contributors.

"Coaching is the process of providing agents with personalized training, feedback and information," said Gülabatin Sun of Citicorp Dienstleistungs GmbH. "Envision's Click2Coach will provide us with an integrated solution for reviewing customer communications and evaluating agent skills to immediately produce personalized training for the agent."

"We are very excited about releasing Click2Coach in additional languages. Localizing Click2Coach has two main benefits for our global customers; ease-of-use and enhanced effectiveness," said Rodney Kuhn, Envision CEO. "Envision is committed to bringing the best technology in the most appropriate form to our customers around the world in order to help them coach, train and develop agents."

■

InfoCision earns 2004 CRM Excellence Award Nation's third largest privately held teleservices firm praised for quality, compliance expertise

Akron, Ohio - InfoCision Management Corporation, an award-winning teleservices firm serving nonprofit and Fortune 500 clients, earned Customer Inter@ction Solutions magazine's 2004 CRM Excellence Award for enhancing customer relationships and extending the customer life cycle.

InfoCision's winning entry described how the company's proprietary Q3* quality assurance system helped a leading credit card issuer increase call compliance by 90 percent in less than a year, improving customer retention. The program consisted of the credit card issuer planting InfoCision phone numbers into its outbound calling lists. InfoCision Communicators then received calls from the issuer's other teleservices vendors. They graded those vendors' calls using the Q3* system, and informed the issuer of all poor-quality and non-compliant calls. InfoCision greatly improve the issuer's customer service while protecting it from potential legal action.

"InfoCision has invested millions of dollars in the people, processes and technology necessary to become the industry leader in quality and compliance," said Steve Brubaker, the company's senior vice president of corporate affairs. "Our clients sleep better at night knowing InfoCision is protecting them from costly legal action. Winning this award is a testament to that." The CRM Excellence Awards were created in 2000 to recognize the leaders in customer relationship marketing. This year's winners are highlighted in the current issue of Customer Inter@ction Solutions magazine.

About InfoCision Recently named the world's eighth largest outbound call center organization, InfoCision Management Corporation is a top-50 provider of inbound and outbound teleservices for nonprofit, religious, political and commercial organizations. Through a combination of high-quality calls and cutting-edge technology, InfoCision consistently delivers the highest possible return on investment for both fundraising and corporate clients. It is this type of quality and service that has earned InfoCision an unparalleled 12-straight MVP Quality Awards, as well as two International ECHO Awards. InfoCision operates call centers at 10 locations in Ohio,Pennsylvania and West Virginia.■

EVENT

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Call Center Operations and Management - Forecasting and Staffing Skills - June 14-15

Who Should Attend
This two-day workshop is designed to give working call center supervisors, coaches and managers the knowledge, skills, and techniques used to manage a world-class call center. This workshop will provide attendees with a complete understanding of the issues, demands, resources, and information that world-class call center managers' deal with every day.

Key Learning Points
- Position your call center as a competitive advantage for your company
- Learn the relationship of service level, staffing, trunking and agent productivity
- Select the right service level and understand the staffing break even points
- Use forecasting and staffing tools to do resource planning and meet service levels
- Increase productivity and reduce costs with effective management techniques
- Track call center performance: Learn what and how to measure

June 14-15, 2004 - Nevada Power, 6226 West Sahara, Las Vegas, NV

Tuition : Regular Price $1395. Special Event Pricing of $895. per student

CLASSIFIEDS

Coaching Skills for Call Center Leaders - Develop Effective Coaching Strategies and Evaluation Forms to Drive Results - June 16-17

Who Should Attend
This two-day workshop is designed to give call center managers, supervisors and team leads (coaches) the skills, confidence and practice to effectively coach and to bring out the best in their employees. Create a culture where involvement and ownership encourages your employees to thrive and to be the best they can be.

Key Learning Points
• Understand the value systems that guide and drive behavior and performance

• Discover and adapt your leadership and coaching styles

• Set attainable goals and expectations, give meaningful feedback and program follow through

• Handle conflict and the difficult employee in coaching situations

• Develop a call quality and coaching checklist and forms

• Enable your employees to take ownership of and partner in their own growth and development

June 16-17, 2004 - Nevada Power, 6226 West Sahara, Las Vegas, NV

Tuition: Regular Price $1395. Special Event Pricing of $895. per student

Build Teams and Manage Change in the Call Center - June 18

Who Should Attend
This one-day workshop is designed to give call center leadership team members the skills and knowledge to lead change and manage stress, and to build teams in the call center.

Key Leaning Points
• Infuse energy and a “can do” team spirit and grow the talents of team members

• Assess each person’s natural team role and individual approach to teamwork

• Appreciate and reinforce the strengths and contributions of other team members

• Discover why change occurs and how to become a “change leader”

• Learn coping strategies and coaching strategies during change

• Learn the types of resistance to change and how to “manage resistance” through change

June 18, 2004 - Nevada Power, 6226 West Sahara, Las Vegas, NV
Tuition: Regular Price $895. Special Event Pricing of $445. per student

Class Hours: 9AM to 5PM each day. Morning and afternoon refreshments are provided. On your own for lunch.

Tuition includes: Course materials and a Certificate of Completion.
Register two or more from the same company receive a 5% discount on each tuition
Register for two or more sessions and receive a 5% discount on each tuition
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Hotels: Many hotels available on the Strip. Closest hotels: Palace Station, Circus Circus, Sahara.

Contact us for More Information and To Register:
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