



Call Center 101

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Learn to manage a call center and focus on efficiency and productivity.

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Introduction

Call Center 101 is intended for managers who want to understand how to make a call center efficient and profitable.

We will give you the keys to understand the different essential components of a successful call center:

- Hiring the best agents
- Leadership methods
- Tips to reduce agent attrition
- Training agents
- Scripts and improvisation
- Which key performance indicators to track
- Call center etiquette and best practices

Over the years call centers have evolved. Organizations often outsource their customer service or sales department for call centers. Yet, managing one's own call center is actually more advantageous for businesses, since one can closely monitor the quality of one's customer service strategy.

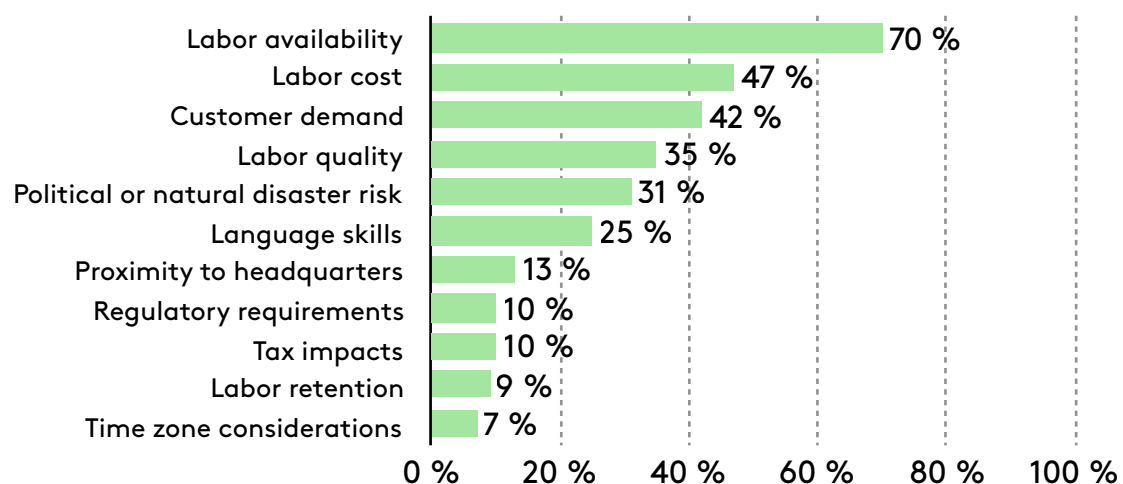
Chapter One

Hiring call center agents

Identifying call center agent skills and warning signs.

It is a well known fact that call centers are constantly looking for hires. Call center agents do not require specific qualifications to perform their job, therefore it's not easy to spot a good potential hire.

In 2013 Deloitte conducted a survey about contact centers workforce. Their findings are not surprising: the primary concern of call centers is workforce availability.



Hiring a call center agent that will excel at their job has never been easy. They are required to have a fitting personality, display relevant skills, and be motivated.

This sounds straightforward, but what happens when you have dozens of candidates who meet the criteria?

Core skills for call center agent excellence

We have prepared a guide to help you spot an agent that stands out and that would excel at their position. Let's take a look at the core skills you should look for in a call center agent.

Adaptability and memory

The agent's job is to provide outstanding service to your customers. In order to do that, they must be able to learn and remember everything about your company and the services you are providing.

Continuous training on the job will help them do that but the skills need to be present in the first place.

Ideally, even during the interview phase you should look for someone who is a hustler as well as a good listener.

After training and practice, call center agents should be aware of every single detail about the services you are providing to your customers.

An inviting voice

Even though physical appearance does not play any role for this position, there is a physical aspect you need to pay attention to – the voice.

You're not really looking for a golden, radio voice, but there are certain criteria every candidate needs to fulfil in order to pass the interview.

The impression they leave during the conversation with you should be one of the main deciding factors.

Empathy

Many customer service calls are complaints, that's a given. A good agent will solve the problem and ensure that the customer feels they're being heard. A

call center is run by humans, and every customer should feel that they are treated humanely.

Attention to detail

After hundreds of similar calls, one's attention has the tendency to flag. It's only human. However an agent has to remain vigilant, because the unexpected call always comes in those moments when you're caught off guard.

Patience and calm

One of the most important skills for a call center agent! Unfortunately, customers that are complaining are not the nicest people in that given moment.

Whether an agent is dealing with frustrated or irritated customers, an agent needs to keep calm and their emotions under control.

In these unpleasant situations, the agent will apologize for the inconvenience, do their best to solve the problem and ask if there is anything else that they can assist with.

Gratefulness

The customer needs to be treated as someone responsible for the company's success. A simple "thank you" over and over again is required to make sure the customer feels that they matter to your business's success.

Autonomy and teamwork

On the one hand, an agent is taking one-on-one calls and needs to be able to work independently, without being supervised or instructed. On the other

hand, a call center is a team of problem-solvers who need to work together to find a solution.

If someone has an unpleasant voice, stutters or has trouble speaking, as unethical as it sounds, you simply cannot hire them as a call center agent.

Efficiency

75% of clients complain about the time they spend waiting for an agent to pick up. Agents must be quick and work rapidly without compromising the quality their support.

Here are three actions that need to be taken on a hierarchical level:

- setting up a database for client information
- planning callbacks when needed
- finding the right channel for better administration

Organization

Hiring an agent who has trouble being organized is a recipe for disaster. Customer service often requires a person to multitask between talking to a client, accessing the database and taking notes.

Sometimes you just can't know in advance if a person is organized or not, even if it seems that they are. A common practice here is to check with their previous employer if they have a track record of being an organized worker. This way you'll know without a doubt.

Creativity

Not every call will go according to plan. Sometimes, a call center agent will need to find a solution that is acceptable for both sides, especially for the customer.

A satisfied customer will return or keep using your business's services. If they hang-up on an agent, unhappy with their assistance, it is very unlikely that the client will remain loyal to your business.

Persuasion

A business has to remain profitable. Sometimes, an agent will not be able to give an offer a customer cannot refuse. However, a customer can think they got what they wanted.

Persuading a customer that the company and an agent have done everything in their power to meet their needs will result in a more satisfied clientele.

Look out for warning signs

While finding the right skills and personality traits may be difficult, there are some signs to help you filter the types of employees you don't want to deal with.

As soon as you notice any of these warning signs in an applicant, thank them and keep looking for a better candidate.

Unwilling to learn

An agent needs to be trained. Not everyone has an experience working a support job, and that's okay. However, if someone doesn't show the willingness to learn and reach the desired standard, simply show them the door.

Argumentative

No one likes employees that are short-tempered and get angered easily. Working one-on-one with an already mad and frustrated customer requires

calmness, not someone who will fuel the fire.

Bad-mouths their previous employer

Whatever happened at their previous job should be left behind. Gossip should be left outside of the workplace. A potential hire who complains about their old boss is likely to repeat the same habits in the future.

Lacks professionalism

A potential hire should be able to hold a professional and polite conversation throughout the duration of their interview. If they aren't able to do so, don't expect them to for eight hours a day. Your priority is not to parent a new hire it's to give them the right tools that complement their existing skill set.

Picking a perfect candidate to strengthen your call center is not an easy task. However, knowing what you're looking for and what you want to avoid will narrow the choice.

Make sure that you do your part. Provide necessary tools, equipment, and motivation for your employees, as well as occasional training. Don't let your team down.

Chapter Two

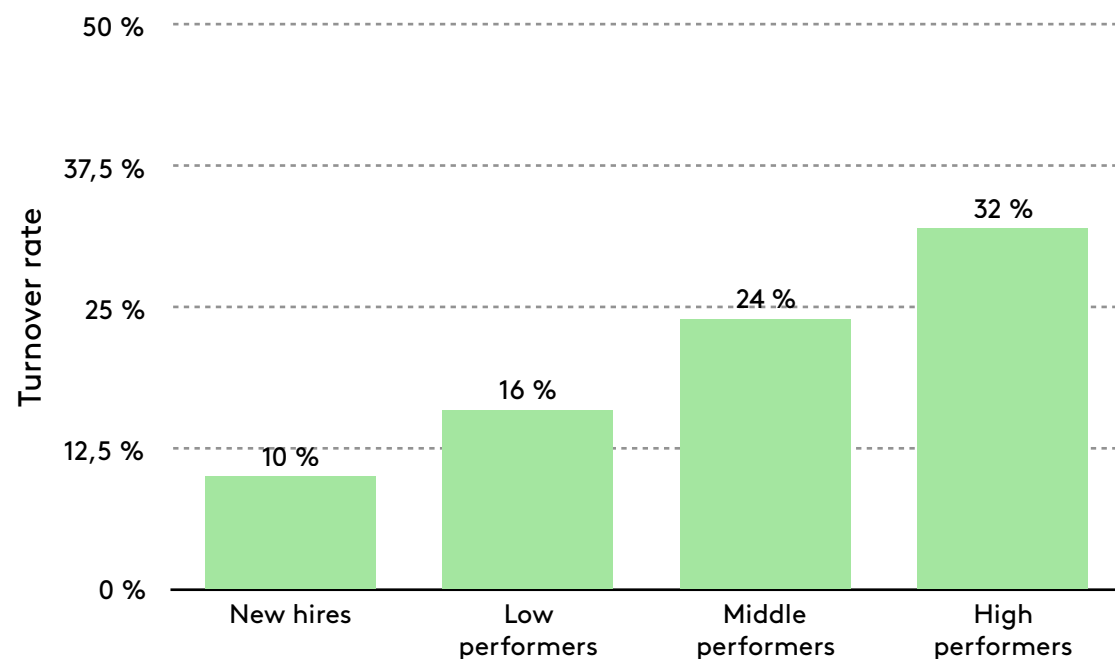
How to prevent call center agent turnover

Your agents are your most valuable asset

High turnover is a common problem that many call centers face. Attrition rate in the industry can often cause problems and may be as high as 20 or 30% annually.

The number one reason?

Employees find it difficult to work with their manager or team leader.



It might be surprising to learn that call center employees who find their work stimulating and rewarding still end up leaving their jobs.

As a manager the worst case scenario is the one shown in the graph above. The graph shows that the best agents, are leaving, indicating that the manager or leader is not doing their job well.

How to retain your best agents?

Here are the two most common ways:

1. Promote them
2. Improve your leadership and management.

We'll examine the later, bear with us. Before we go deeper, let's take a look at three primary reasons why employees quit – and even better, what you can do to avoid this recurring issue.

Rules and guidelines are essential

Managers should always have their own set of rules. Employees, especially when starting out, appreciate there being rules in place to guide them as they learn the ropes. It helps them understand the structure of the system, and allows them know the boundaries within their positions and hopefully how to work within them.

Managers need to acknowledge good work

The number one mistake managers commit is failing to acknowledge good work.

Employees look to their managers and team leaders for guidance, inspiration, and praise. When they do a good job and you don't let them know that you appreciate it, it's a crushing blow.

Maslow's Hierarchy of Needs cites esteem as the last tier needed for self-actualisation – if managers consistently fail to recognise their great work, what impulse do they have for doing it again in the future?

When you think about it, it's only human. We all like to feel appreciated, and this becomes essential when agents are putting great amounts of effort into their work - remember, it's a tough job to be a call center agent.



How to improve call center leadership

Trial and error is also part of human nature. While nobody is perfect it's important that you give an image of leadership so that agents look up to you.

Show your support

How much time do you spend with your staff? The amount of time is crucial in helping new comers overcome the natural difficulties they will face while getting familiar with the job.

Team managers are coaches and mentors but also need to bring operational rigor to your organization.

On average, a call center manager should spend:

- 2 hours/month doing side-by-side observations,
- 1 hour/month undertaking remote monitoring,

- 1 hour/month doing off-line coaching
- 1-to-1 reviewing with each team member

Reward your agents

Being recognized as doing a good job is as important for a competitive person's self-esteem as meeting or beating a target. With that in mind, don't hesitate to take rewards exciting and immediate. There are a number of interesting alternatives to just offering cash. Depending on your staff's interests, it could be an Xbox, a meal at a restaurant, a pampering session at the health spa – anything really.

Don't praise in excess

Too much praise becomes meaningless, so only give it when it is truly warranted. Try to acknowledge your agent in public as much as possible as it will help their confidence and self-esteem.

Coach them in private, so that they won't feel humiliated in front of everybody.

Trust your agents

People are much more productive when they are let off the leash a bit – this shows that you have confidence in their abilities and it boosts their self-esteem, as long as what they do doesn't hinder their deadlines or daily quota.

Be visible

It is essential that your team see you in the office, whether you are just supervising their work, or simply checking on them to see how they are doing.

Being visible and available may also help in increasing your team's motivation.

Be consistent in your words and actions

Make sure you follow through and deliver on the tasks and commitments that you made. Being inconsistent may be misconstrued as being someone who is not trustworthy.

These are just some of the most common issues that team leaders overlook when supervising a call center environment. Make sure you don't!

Chapter Three

20 best-practices for call center agent training

A trained agent is a happier agent

Managers overseeing a call center know that their agents require regular training sessions, so that they can deliver exceptional customer service. Regular training is crucial for call center agents, whether it's about any newly launched product or modifications in the existing product.

Boosting agent productivity during training

From taking orders to providing customer support, sticky situations are bound to arise. But how you handle these situations can mean the difference between creating loyal customers and losing business.

Here are actionable training tips and best practices you can use starting today.

Empower your agents

Empower your agents to make decisions on behalf of the company is crucial. A highly trained agent with the power of decision will not only ensure higher customer satisfaction, but will also enable single call resolution and thus result in a more positive customer experience.

It's all about encouraging agent buy-in, not only into the value-driven service their employer is providing, but also buy-in to the client brand that they are representing.

Training should be varied and engaging

Try and move away from monotonous training. If your agents aren't engaged, they won't learn... And your customers won't benefit!

Practice handling calls from the start

Handling calls during the initial training session is an activity that can not be eliminated from the curriculum. It is imperative that the new hires receive practice handling real-time calls.

There is no substitute for this kind of experience. Role-play is good, but real call handling is essential. Trainers should make sure that the equipment works and is available for each "real-time" call handling session. Operations should make this a priority.

Create instant 'shout outs' based on great customer feedback

Recognize great customer support in a public way. When your customers email you about a great experience, you can announce it to the group, post it on an overhead call board monitor, and put it on the 'shout out' bulletin board in your open space.

Encourage upper management to participate

It's really important that the upper management team takes the time each week to listen to calls and publicly praise the recognized agents with maybe a certificate or gift card for example. This way, the agents will feel incentivised to do their best.

Host monthly meetings

Schedule monthly calibration meetings with representatives from all of your different departments to review calls and tweak your methods or strategy in accordance with common insights.

Make sure all feedback is clear and actionable

It's crucial that you deliver feedback that agents can respond to. Make sure all feedback you give is clear and actionable. It is important to create opportunities for agents to discuss quality with their peers.

Quality and best practice in the call center should not be driven solely by manager-to-agent conversations.

Lunch and learn

Start lunchtime learning sessions where staff can elect to deliver a session on their topic of choice.

Even if the topic isn't work-specific, you're giving your staff the opportunity to see a different side of their colleagues, and the person delivering the session is able to share their energy and enthusiasm for something they're passionate about. Great for upping the energy levels and engaging staff.

Buddy-up your new starters with your best performers

Use your best agents to support the training of new starters.

Building relationships early with the top performers makes new agents want to be like them.

Offer incentives for achieving team goals

Another call center customer service best practice is to offer incentives each month to our agents who successfully meet their team goals.

Use speech analytics to identify agent training opportunities

Being able to analyze large volumes of agent/customer interactions releases information on specific calls with issues, and trends across the whole agent population, creating the opportunity to coach staff using identified good examples to improve standards across the contact centre.

The resulting information not only creates training opportunities but also enables refinement of scripts, improving the overall performance of the contact center.

Align performance management with your wider strategy

Make sure your whole approach to Performance Management is aligned to a wider customer service strategy and employee engagement program.

Your call center agents can then see the bigger picture and are more likely to buy in.

Create an agent workgroup to set targets and KPIs

This will help you set realistic and achievable targets that staff will buy into, as well as help change the perception of your senior management team as to the definition of high performers.

Separate call accuracy from customer service

Break your quality measures down to address specific focus areas for agents. For example, split call accuracy from customer service, as someone could be great at one but awful at the other.

This will give you a greater ability to give agents praise where it's due, but also address any areas that are in need of development.

Know your business

All good business people understand that knowing your customers increases your ability to serve them, retain them and grow your base. Business knowledge is power.

The challenge facing contact center managers is how to gain knowledge on their customers, how they are being served by the company's contact centres and then how to use that information to further improve quality of service and revenues.

Work on improving knowledge management

“Hone your skills to perfection and learn something new everyday”. This is because the only long-term competitive advantage for any organization is the collective brainpower of its people.

Build an open and transparent company culture

Being open and transparent with your agents over time will build a culture where feedback and coaching is the norm – and fear will subside.

Always make sure your agents identify with your values

In the training process, concentrate on how agents bond with the supervisors and identify with your core values.

If you identify someone who does not share your values during the training process, you may have to let the agent go right away.

You can train for skills, but you can't change values .

Ask your agents for feedback

Provide your agents with feedback forms at the end of each training session to gain a wider understanding of how they feel the training session went – and also to see if, how and what you can improve.

Chapter Four

Using scripts for agent productivity

Structure your agents' discourse

Productivity in the call center is the number one goal. The usual way of envisioning productivity is best results in the minimum amount of time. In this respect, scripts help agents a lot.

However, lately scripts have acquired a bad rep. Customers generally don't appreciate talking to somebody who sounds "robotic".

We want to show you how scripts can enhance call center productivity, streamline customer service and bolster confidence in employees. Whether your call center is sales-based cold calling or a customer service center, scripts can be considered a staple of the industry.

69% of people prefer
unscripted customers support calls.



What is a Script?

In a call center, a script refers to prepared talking points and common questions referring to the calls coming in or going out.

For sales, this can be information ensuring that each potential lead is maximized, and customer service scripts allow customers to minimize their frustration and get the help they need as fast as possible.

In theory, scripts cover the spectrum of customer needs, giving the agent an answer for any question a customer can ask. To minimize searching,

fumbling, or asking a manager, the customer service script will make sure the agent has all of the answers in front of them.

For cold calling, it will give the agent talking points to keep the lead on the phone and get the most information out of them. It can convince customers that they need your product, even if they were apprehensive to start.

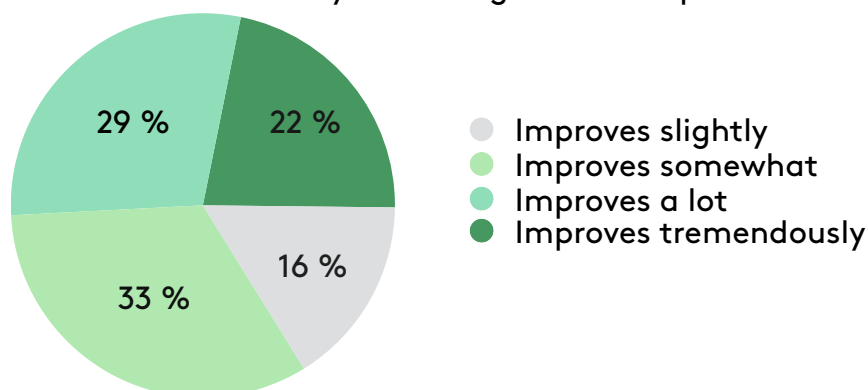
The script will ensure that, even if the agent gets off of the phone without a lead, they will have some useful information.

How do Scripts Enhance Call Center Productivity?

Call center scripts help productivity in multiple ways. Whether it is a sales script or a support script, these tools are essential for getting the most out of your call center.

Yet it is important not overlook the fact that prospects and clients do not like talking to a machine. In a survey conducted by Hello Operator , most of the interviewees confessed that they prefer unscripted calls.

How much does your experience of calling customer service improve when the agent doesn't sound like they're reading from a script?



Decrease training time

Related to increased confidence, the more that is covered in a script, the less time another agent has to spend training a new agent.

For the fresh faces who don't know how to talk to customers over the phone, these scripts will serve as a game-plan on how to approach each phone call.

An effective sales or customer support script will cover most of the basics that a new agent needs to be aware of; decreasing the time it takes for them to feel confident on the phone. This will also lower the amount of time that a manager or another agent has to spend away from other valuable work.

Avoid mistakes

Mistakes are generally unavoidable, but a good script can limit these errors by ensuring that the talking points are always on the agent's mind.

Especially in reference to customer service, it is important that customers get the most out of a phone call in the least amount of time .

An agent fumbling around, hitting the wrong keys and losing information will decrease both customer service and call center productivity. A script will limit these instances.

Promote consistency

The use of a script will give uniformity to the calls that take place in your call center. Especially in reference to customer service scripts, one of the main benefits is to promote consistency across the call center.

When a customer calls in with an issue, you can be sure that each agent will handle it the same way. This will decrease the amount of time spent on the phone with each customer, and ensure that all of the agents have the correct answers in front of them at all times.

Retaining information

Especially with regards to sales calling, recording the right information can be the difference between a lead and a dead end. Scripts should have areas in which the agent can write pertinent information about the customer. This will prevent agents from asking for something twice, and will remind them to gather information from the customer.

Best practices when using call center scripts

A script has to sound as natural and spontaneous as possible. Even if a script is written speech, letting your agents improvise is key!

Scripts do enhance productivity when used correctly. Remember, nobody wants to feel like they are talking to a machine.

Make it easy to skim

One of the purposes of a script in a call center is to streamline a conversation. This will translate into customer frustration and will inevitably be counterproductive. It is important to use a different font and sometimes even color-coding certain talking points. A script that is easy to maneuver will enhance call center productivity.

Learn the script

Customers want to speak with a person, not a robot. Human interaction is paramount in any call center. If a customer feels that an interaction is too staged, they will become distant and unhappy. It is important that agents know the script and do not appear as though they are reading from a sheet of paper. This comes with practice, but it is important to put in the work before hitting the phones.

Customize your script

Scripts are not a one-size-fits-all solution. Customers have different needs and unique circumstances. This must be taken into account when crafting scripts for your call center. Having a few different scripts on-hand will help agents identify the best way to help a customer.

Additionally, each agent has a different personality. This should also be taken with a grain of salt, as something that Agent A says may seem unnatural or forced coming from Agent B. It is vital to know all of your staff and your customer base.

Trust your agents

Presumably, you recruited your agents for their ability and expertise. They are on the front lines, and usually know what customers are looking for.

It is important to consult agents when developing scripts for them to use. If they feel that they haven't been consulted, they are more likely to ditch the script prematurely.

Use real calls to create your script

In relation to the tip above, a good way to make sure a script is feasible is to take note from a real interaction. One of the calls with your best agent will give the rest of the call center an example and something to work off of.

It is important to know what real customers react to and what they are annoyed by.

Don't be afraid to change the script

Writing an effective sales or support script takes a bit of trial and error to perfect. There is also a good amount of fluidity involved. Monitor trends in frequently asked questions and stopping points, and tailor your scripts accordingly.

A script that worked six months ago may be obsolete, so it is important to change it as your customer needs evolve.

Let agents improvise

More important than any script, is that agents listen to the customer and react appropriately. Scripts offer a solid foundation on which a conversation should be based off of, but a call center script can only go so far.

At some point, the agents need to feel out the conversation for themselves. An amount of improvisation is required in this line of work, and agents that only work within the confines of a script will not be effective.

Using a script for your call center is something that a lot of managers are reluctant to do. There is a certain stigma attached to scripts in the industry, from both the agents and the customers themselves.

They improve call center productivity and customer satisfaction, as well as develop a platform of informed conversation with the agent.

Customer needs are always changing and one script may not be useful for all circumstances, but guidelines are incredibly helpful for an effective call center.

Trust the agents you hired, and give them the best tools to succeed.

Chapter Five

Key Performance Indicators to keep an eye on

You can't manage what you can't measure

Knowing what and how to measure is particularly true in the call center, where key performance indicators are a prerequisite for effective decision-making. Yet few call centers use key performance indicators, or KPIs, to their full potential.

In short, performance measurement and management are critical disciplines that must be acquired for any call center that aspires to world-class performance.

Only five metrics are fully relevant to track performance in the call center.

These KPIs represent the 80/20 rule: 80% of the value you receive from performance measurement and management in your call center can be derived from these 20% simple metrics.

- Cost per call
- Customer Satisfaction
- First Call Resolution
- Agent Utilization
- Aggregate Call Center Performance

Call center metrics that don't matter (as much)

There is a common misunderstanding that if Average Speed of Answer and Call Abandonment Rate are low, then performance increases automatically.

Yet, this assumption proves to be wrong. This is what happens as explained by Eric Zbikowski in MetricNet's expert.

"These facts fly in the face of almost all call center wisdom, which holds that ASA and Call Abandonment Rate should be driven as low as possible.

The reality is that these measures can yield unintended results if pushed too low. They will increase your costs without any corresponding increase in customer satisfaction."

Most call centers commit two major mistakes when it comes to performance measurement:

- 1) they track too many metrics
- 2) they do not exploit the full potential of their performance metrics as a diagnostic tool.

The KPIs to measure for success

The two "foundation metrics" that every call center should track on an ongoing basis are **cost per call** and **customer satisfaction**.

The next two metrics in the top five are the ones that have the greatest influence on cost and customer satisfaction: **agent utilization** and **first contact resolution**.

Finally, the last metric, what Eric Zbikowski calls an "aggregate metric" because it provides an overall measure of call center performance, is the **balanced score**.

These five metrics not only allow you to effectively measure your call center performance, but they enable you to:

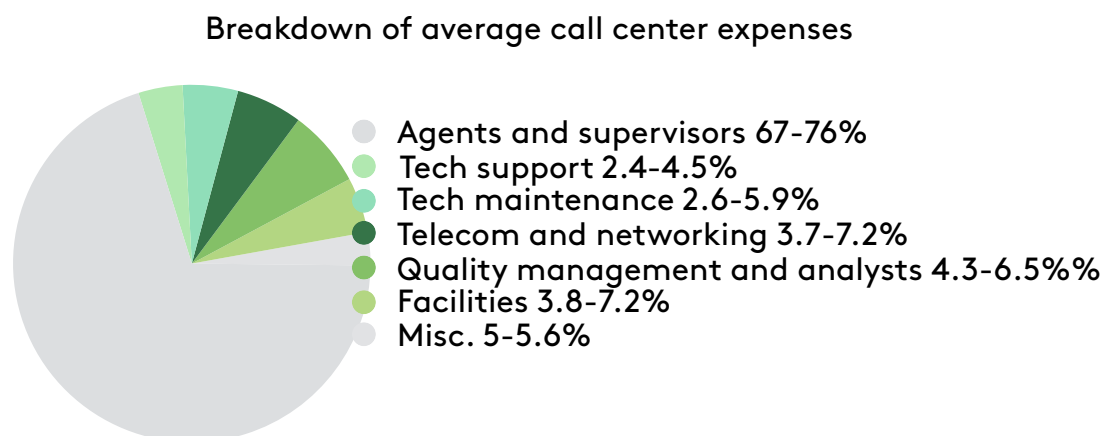
- Identify strengths and weaknesses in the call center Understand and diagnose the performance gaps ftriggers Advise actions to improve performance

- Track and trend performance over time
- Benchmark performance vs. industry peers
- Set up performance goals for both individuals, and the call center overall

These are the metrics we'll be examining here as they are at the foundation of cost and productivity.

Cost per Call correlated with Agent Utilization

It is common knowledge that agents represent the single biggest expense in the call center. In fact, for the average call center, 67% of all costs are labor related: salaries, benefits, incentive pay, and contractors.



Labor costs are the greatest indicator for the cost per call metric, and the agent utilization rate is the best way to measure labor efficiency. Because labor costs represent the overwhelming majority of call center expenses, there are 2 possibilities:

- High agent utilization, meaning a low cost per call.
- The vast majority of call centers are committed to keeping their agents utilization rates high because in turn, it has the effect of minimizing cost per call.

Yet, a problem arises: high utilization rates taken to the extreme, can actually increase your costs by driving agent turnover rates higher. Whenever

utilization numbers approach 80%–90%, the call center will see relatively high agent attrition rates because they are pushing the agents too hard.

Extremely high utilization leads to burnout, and that, in turn, leads to turnover. Turnover is one of the most costly things that a call center can experience.

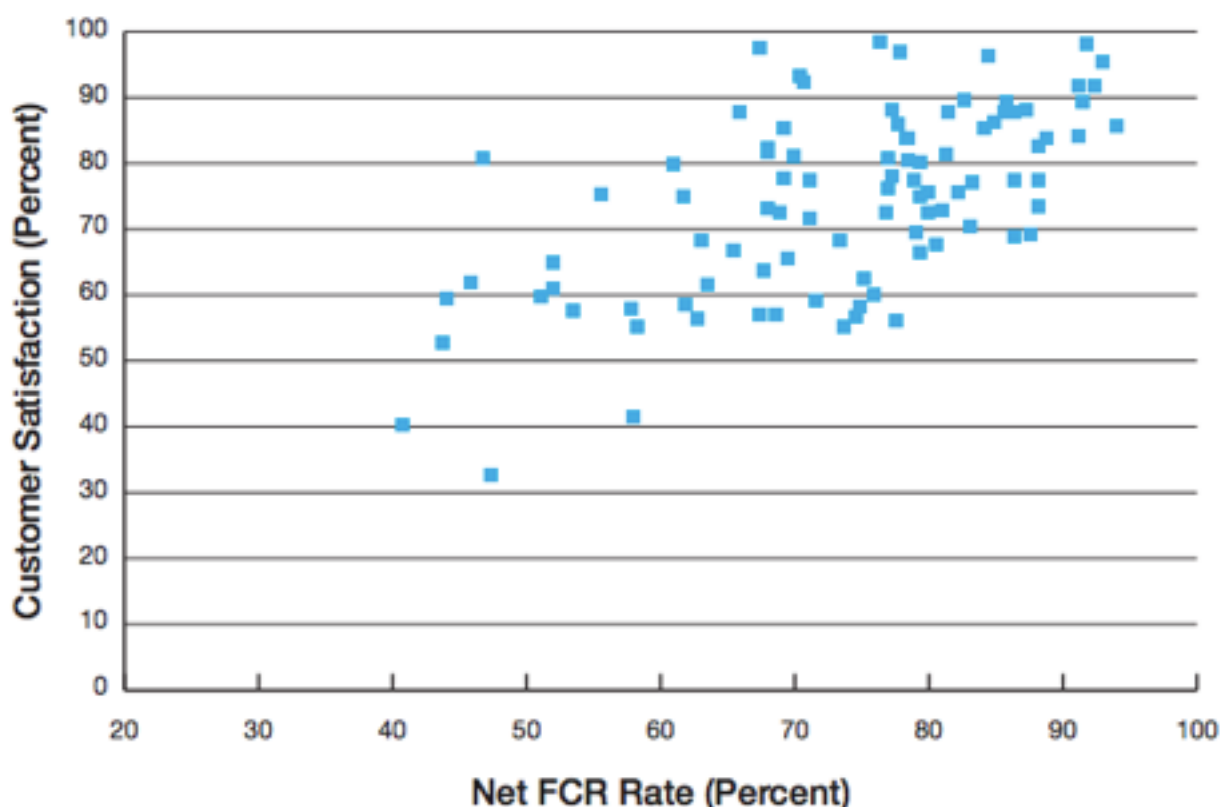
In order to proactively manage agent turnover, best-in-class contact centers focus on “career pathing,” training, and time off phones to work on projects.

The more time spent off the phones, the more training agents receive, and the more career coaching they have, the lower the turnover will be.

The formula for determining agent utilization is somewhat complicated. It factors in the length of the work day, break times, vacation and sick time, training time and a number of other factors.

First Call Resolution and Customer Satisfaction

Customers want a resolution to their problem or an answer to their question, right then and there! Thus customer satisfaction strongly correlates with first contact resolution. The first contact resolution (FCR) is the percent of contacts that are resolved on the first interaction with the customer.



Low agent utilization means high labor costs and cost per call.

Calls or chats that require a customer callback, or are escalated to another source of support do not qualify for first contact resolution.

For e-mails, which now account for a significant percentage of all service desk contacts, the de facto standard emerging in the industry is that resolution within one business hour of receiving a customer e-mail counts as first call resolution.

FCR is typically measured in one of two ways:

- the agent checks a box at the conclusion of the call or chat session to indicate that the call was successfully concluded on the initial contact,
- customers are asked in follow-up customer satisfaction surveys whether their calls were resolved and concluded on the initial contact with the service desk.

The first method requires periodic audits to ensure that agents are accurately reporting FCR on the tickets they handle.

Neither method of measuring FCR is perfect, but it is one of the most important KPIs to track and trend.

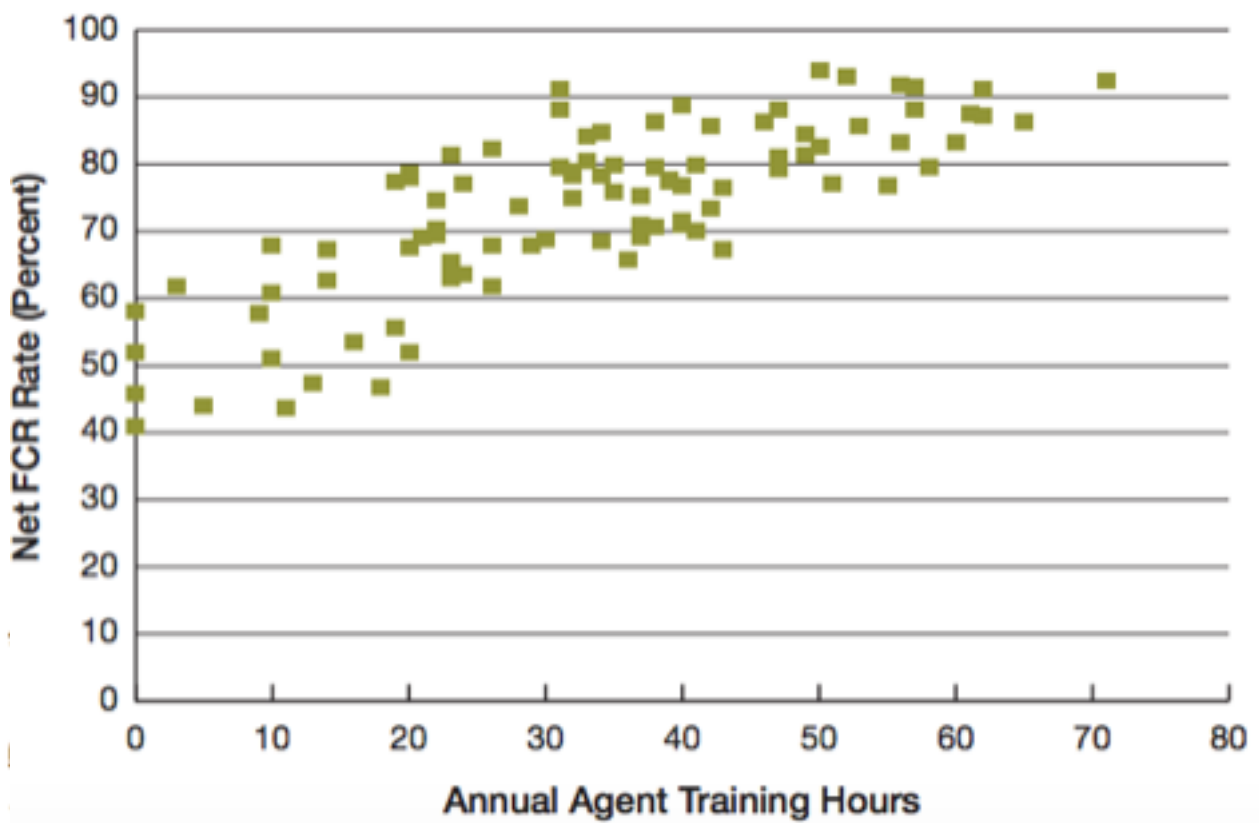
FCR is a measure of how effectively the call center operates and is a function of many factors, including the complexity and types of transactions handled, the experience of your agents, the quality of agent training, and the tools that are available to your agents (e.g., knowledge management, remote diagnostics, etc.).

Gross FCR looks at all incoming contacts and makes no adjustment for contacts that cannot be resolved by the level one service desk.

Gross FCR = Number of contacts resolved initially ÷ All incoming contacts

Net FCR on the other hand makes adjustments for contacts that cannot be resolved directly.

Net FCR = Number of contacts resolved initially ÷ (All incoming contacts – Contacts that cannot be resolved at level one)



Net FCR is by far the more relevant of the two FCR metrics.

Customer satisfaction is affected by various performance variables, including:

- Average Speed of Answer (ASA), Call Quality,
- Handle Time.

Turns out, the biggest driver of first call resolution is agent training hours. The clear implication is that agent training pays off in terms of improved FCR.

Balance Score

Establishing a single, overall score for your call center is critical. We call this measure the Balanced Score because it truly does communicate a balanced picture of call center performance.

This is a mechanism that utilizes the key measures tracked in a call center, including cost per call, average speed of answer and call abandonment rate, and aggregates them into a single KPI of call center performance.

The value of this metric, when tracked over time, is that it enables call centers to determine whether overall performance is improving or declining.

Oftentimes, when a call center attempts to communicate its performance to other stakeholders in the business, particularly to people who do not understand call center operations, they quickly become overwhelmed by measures like speed-of-answer and abandonment rate, and they are confused as to how to interpret the results.

They are likely to focus in on one, an easily-understood measure like abandonment rate or first-call resolution rate, and draw conclusions about the overall call center performance from these two (relatively unimportant) measures.

The Balance Score, tracked over time, enables call centers to determine whether overall performance is improving or declining. This is a classic case of “missing the forest for the trees”. It is therefore absolutely critical to communicate the overall performance of the call center, and the Balanced Score is perfect for that. It allows the aggregation of a whole series of measures, the normalization of those measures, and the creation a single all-encompassing indicator of call center performance on a monthly basis.

In this way, the call center can track its overall performance, and, in any given month, may see costs go up, customer satisfaction go down or speed of answer increase. However, these individual measures take on a secondary level of importance because the Balanced Score provides a more complete and accurate portrait of call center performance.

Chapter six

Boost call center excellence

30 tips to enhance call center etiquette

Phone behaviour can be tricky. Good call center etiquette creates customer support and service excellence that benefit your company. A good way to ensure that a customer can call any department within your company, in any city, on any day, and be dealt with in the best way possible.

Customers love consistency, and they expect to receive the same level of service that they received today when they call tomorrow, next month, or next year.

Whether your company is big or small or your call center is only counts 3 or 40 agents you have to keep your customers happy .

Remember, 70% of buying experiences are based on how the customer feels they are being treated. That's enough reason to invest in call center agent training and make sure everybody knows the etiquette of phone support behaviour.



70% of buying experiences are based on how the customer feels they are being treated.

Answering the phone

The way a company answers the phone says a lot about the kind of service you can expect to receive. How you answer the phone sets the tone of the entire call.

The correct phrases said in the right order can give a positive first impression and convey an immediate message about your company. The basic rules are as follows:

- Pick up the phone within three rings. Greet the caller.
- Give your name or company name.
- Ask the customer if and how you can help.
- Don't make your greeting too long or over the top, as it can quickly become annoying.

Nobody likes to be greeted with superfluous information, like this: "Hello. It's a beautiful day here at Springtime Solutions. How may I help you?"

What's in a name

Here are some tips that can help your call center agents form a roadmap to addressing your callers in the way they like.

The key is to pay attention to your customers. They will let you know what they like and dislike.

- Listen to your customers! They'll tell you how they like to be addressed. "This is Dr. Stan." (Call him Doctor.) "This is Mrs. Smith." (Call her Mrs.) "This is Jane Brown." (Call her Jane or Ms. Brown, to be safe).
- Address your female customers as Ms. rather than Mrs. or Miss. If she wants to be called something else, she'll let you know.
- Ask permission to use your caller's first name. "May I call you Bob, Carol, Ted, or Alice?"
- Apologize, if customers don't like what you call them, and address them the way they prefer.

Putting a customer on hold

Using the proper etiquette for putting your customers on hold helps avoid some pretty uncomfortable moments. Here are the best practices that prevent you from making any faux-pas:

- Asking customers if you may put them on hold and waiting for a response.
- Giving the caller a time frame and explain how long the caller will be on hold.
- Telling customers why they're being put on hold.
- Thanking customers for holding after returning to the line.

Sometimes being placed on hold is an inconvenience for callers, so don't automatically assume that they'll accept.

Whenever a caller responds with a "No," be sure to ask whether you can have someone return the call, take a message, or transfer the caller to someone else.

Silence can be golden

Most customers prefer to have silence or soft music while they're on hold. Some absolute turn-offs include prerecorded advertising, weird computer music, or heavy metal.

- Any music that is loud, aggressive, or hurts the ears isn't what you want to play for customers while they're waiting on hold.



83% of consumers require some degree of customer support while making an online purchase.

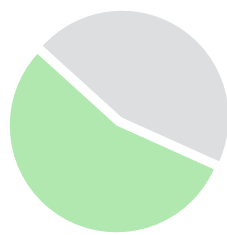
Transferring the call

Customers have the least telephone tolerance when they're being transferred again and again. Who doesn't? I may add.

Customers think being shuffled from department to department means that staff members are too overwhelmed to care or that the company just isn't interested in what they need. Here's what you should do instead:

- Explaining why the caller is being transferred and to whom.
- Asking the customer if he or she minds being transferred.
- Making sure someone picks up the call before you hang up.
- Telling the person to whom you're transferring the call the caller's name and the nature of the call

In the event the caller doesn't want to be transferred, offer to take a message and assure the customer that you'll personally see to it that the message gets into the hands of the right person. Then, after you hang up, see that the message gets safely to its destination.



55% of consumers would pay more for a better customer experience.

Taking a message

Poorly taken messages produce uncertainty and worry for the customer and put the person receiving the message at a disadvantage when he calls the customer back.

Instead, you can take messages that provide the customer with a sense of confidence and empower your co-workers by incorporating the following steps in your message-taking routine:

- Explaining the reason for your co-worker's absence in a positive light, for instance by using general phrases that don't reveal too much information, such as "Bill isn't available at the moment" "Bill is in a meeting"

- Informing the caller of the general availability of the person to whom he wants to talk before asking for the caller's name.
- Giving the caller an estimated time of your co-worker's return.
- Offering to help the caller yourself, take a message, or transfer the call to another capable party.
- Writing down all of the caller's important information and attaching to any pertinent files.

Ending the call

Never underestimate the importance of ending the call on a positive note.

Key actions for ending calls include:

- Repeating any action steps you're going to take to ensure that you and the customer agree on what's going to be done.
- Thanking the customer for calling and letting him know that you appreciate his bringing the problem (if there was one) to your attention.
- Allowing the caller to hang up first so that she doesn't accidentally get cut off in the middle of a sentence.
- Writing down any important information as soon as you get off the phone. Doing so prevents you from getting caught up in other things and forgetting pertinent information.
- Asking the caller whether you can do anything else for him or her. Doing so gives the customer a final chance to tie up any loose ends that may not have been discussed during the call.