

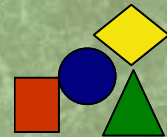
# The Quality of First Call Re\$olution

*What is it*

*Who wants it*

*Where do I track it*

*How can I have it*



N. California Contact Center Session | Jan 2010  
Dru Phelps, Value Partner, 4D-CRM

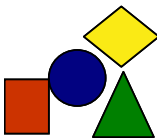
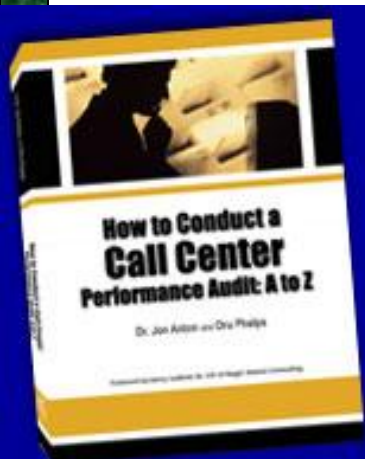


# Presenting Dr.U



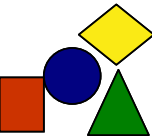
## Dru Phelps, Value Partner

- **Speaker, author, supporter and networker**
- Conducts CC Clinics w Labs to diagnose **\$40k ROI**
- **4D-CRM**; 4 dimensional Customer Relationship Models
- Graduate of **Purdue** in Org. Leadership, Masters from **USC** in Systems Management and Human Resource Certification
- Advisor to Customer Service Centers in performance-based, change management, becoming **Centers of Excellence!**  
Assessor for Baldrige Award, Diagnostics, Benchmarking
- Author and expert on measurement methods in **"How to Conduct your Call Center Audit: A to Z"** and the **"4-Dimensional CRM: Customer Service Model"** 05/10



# What is the brand of your Call Center

- **Customer Service** is an extended, welcoming arm of your Business
- Your Agent is the '*voice **to** the Customer*' on a request, purchase, question, or complaint
- It is critical to understand this **Rule of 4**;
  - Why **Businesses** receive a call
  - How the **Agent** manages that call
  - If the **Customer** gains resolution to that call
  - Could that **\$ave** you time or money?



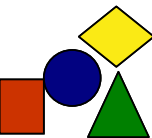
# Who wants something better?

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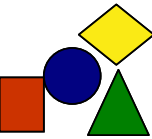
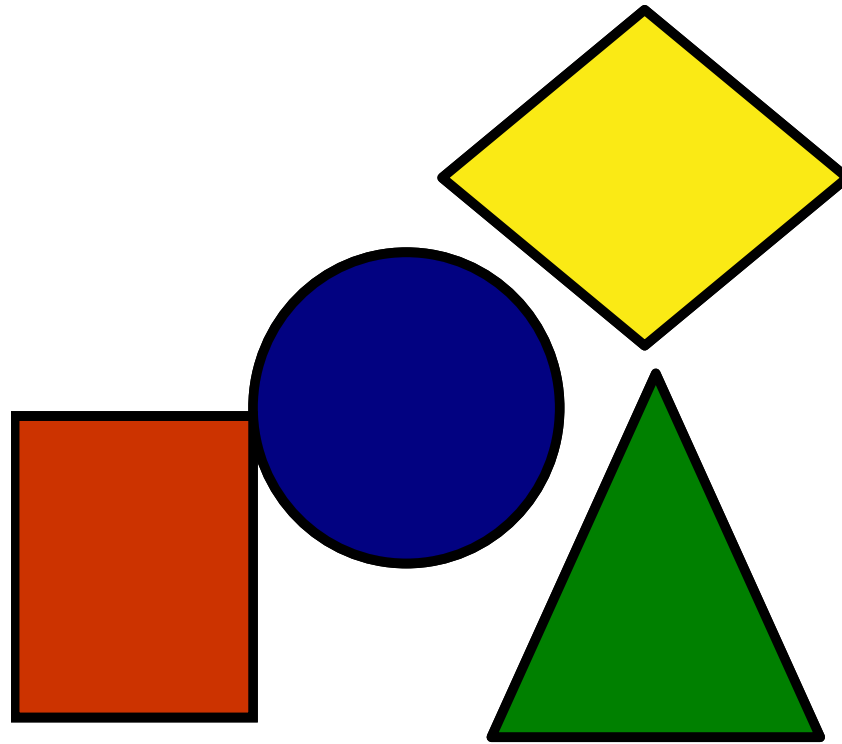
- **Vision without action is merely a dream.**
- **Action without vision just passes the time.**
- ***Vision and complete action can change the world.***

**Year 2010** – see it, know it, act on it!

What is in **'it'** for you?



# Which symbol is your style?



# 4D - Make the 'grade' for Resolution

Grade each dimension, as-is: A, B, C, or D

## AGENT

Selection  
Education  
Communication  
Supervision

## CUSTOMER

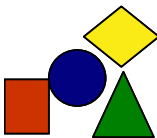
\$sales- Demographics  
Satisfaction Survey  
Complaint Recovery  
Loyalty Opportunity

## SYSTEM/SUPPORT

Contact Routing  
Staff Scheduling  
Quality Monitoring  
Technology Usability

## BUSINESS

Our Reports  
My Metrics  
Reduce Cost- Lean  
Add \$ROI Value



# Who needs to know

- **Availability (Are we there?)**

- Hours and days of operations
- Line blockage/busy signals
- Self-service options

- **Service**

- Self-service utilization
- Multi-channel opportunities
- Value-added relationship
- Best practice recognition

- **Staff utilization (match workforce to workload?)**

- Agent occupancy
- Schedule efficiency
- Employee retention rate

- **Quality (How well?)**

- Monitoring results
- “One-and-done”
- Customer survey feedback

- **Speed of answer (How fast?)**

- Avg speed of answer (ASA) to (FCA) \$\$\$
- Longest delay in queue (IVR)
- Service level agreements

- **Contact handling (Call flow?)**

- Average handle time (AHT)
- After call work (ACW)
- Transfer or On-hold time
- System speed and availability

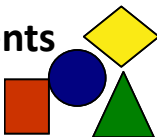
- **Revenue**

- Conversion rate (Are we selling?)
- Impact of lost opportunities
- Upsell rate (Are we generating business?)

- **Customer retention**

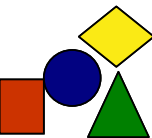
- Quality of customer information
- Learning & Innovation
- Value of information to other departments
- Career growth of staff in the center

**Q. Form Rating**

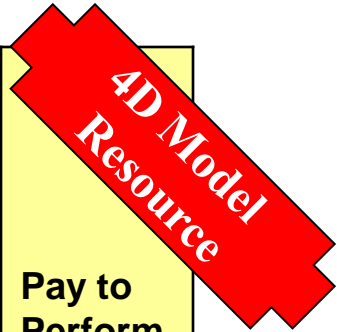


# Change in Quality Today

- Q. is NOT: technical information, industry jargon, professional affiliations, cost center, overhead, political bantering, an empty slogan, **not a % .....**
- **IT IS: Agent to Customer, Business & Support;** answering quick, understanding needs, upEducating one another, **completing** with an extra spin, conserving loyalty, doing things different, WOW for the caller, and a brighter, better, easier way . . . .



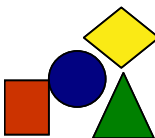
# Correlation Table: of Quality + Caller Sat



Satisfaction Survey Says:		How I Hire	How I Train	How to Monitor	Pay to Perform
<b>Code</b>		<b>NH</b>	<b>ED</b>	<b>QM</b>	<b>C-Sat</b>
<b>Agent, Business, Caller</b>		<b>B</b>	<b>B + A</b>	<b>S + A</b>	<b>C</b>
<b>Productivity or Quality</b>		<b>Q</b>	<b>PQ</b>	<b>Q</b>	<b>PQ</b>
Identify the issue	P	X	X	X	
Trustworthy Agent	P	X		X	
<b>First Call Resolution</b>	P	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
Will repurchase	P		X		\$

*“Have we resolved your issue today?”*

*“I can get you with a Medical Specialist”*



# Guest Profile - Preferences

[Read About It](#)

## Property Specific Preferences by Category

### Amenity:

- Bath Mat, Extra
- Foam Pillow
- Refrigerator
- Microwave

### Info. Only

- 
- 
- 
- 

### Optional Text

### Food:

- Fresh Assorted Fruit
- Nuts, Assorted
- Salty Snack

- 
- 
- 

### Newspaper:

- Wall Street Journal
- Local Newspaper

- 
- 

### Beverage:

- Bottled Water
- Diet Coke
- Orange Juice
- Grapefruit Juice

- 
- 
- 
- 

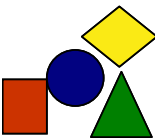
Close

# Sample of QM form (35 from 100 total points)

ASK =  
Prescriptive

## 1. Customer Interaction and relationship - 35%

Listening Skills	Listens to and empathizes with customers; acknowledges <i>customer concerns</i> .	7
Problem-solving	Gathers appropriate information to determine customer's needs, applies problem-solving skills, and <i>resolves the inquiry effectively</i> .	7%
Communication skills	Communicates information about the resolution of the inquiry to the customer clearly and completely	7
Call approach	Controls the pace and flow of the conversation	7
Customer relationship management	Maintains up-to-date customer data and follows customer relationship management processes	7



# Caller Satisfaction: Feedback to Your Agents

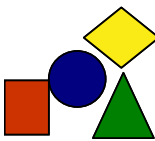
## Agent Scorecard

Welcome **Linda Cooper** Today is **01/10/2008** [Log Off](#)  
[Send Feedback to Us](#)

31 days Top 2 Boxes	Percent Very Satisfied Score	Percent Satisfied Score	Percent Neutral Score	Percent Dissatisfied Score	Percent Very Dissatisfied Score	Absolute Satisfaction Score	Percent Resolved	<a href="#">Click For More Info</a>
Overall <b>83.33%</b>	<b>41.67%</b>	41.67%	16.67%	0.00%	0.00%	4.25	<b>72.73%</b>	24 surveys

<a href="#">302817</a>	94949261		Very Satisfied	08/09/2006
<a href="#">307565</a>	9498362.		Very Satisfied	
<a href="#">308008</a>	5036472'		Very Satisfied	
<a href="#">308194</a>	2487709:		Very Satisfied	
<a href="#">293678</a>	5087983'		Satisfied	
<a href="#">298623</a>	6193039:		Satisfied	08/03/2006
<a href="#">303973</a>	7062977.		Satisfied	08/11/2006
<a href="#">304187</a>	4404427:		Satisfied	08/11/2006
<a href="#">305699</a>	2486282:		Satisfied	08/14/2006
<a href="#">288057</a>	9728181:		Neither Satisfied nor Dissatisfied	07/20/2006
<a href="#">305454</a>	7574867:		Neither Satisfied nor Dissatisfied	08/14/2006
<a href="#">290236</a>	3012995:		Dissatisfied	07/24/2006
<a href="#">303403</a>	6514088:		Dissatisfied	08/10/2006
<a href="#">290719</a>	9036742:		Very Dissatisfied	07/25/2006
<a href="#">299383</a>	2629684:		Very Dissatisfied	08/04/2006

**This agent knows, 41% of her customers are very satisfied and 73% of her calls were resolved on 1<sup>st</sup> Call from 24 surveys**



# 4-Levels of Metrics for Service

- Are you driven for Revenue, Retention, or Results?

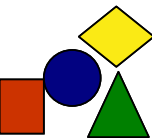
- Recovery

**4. Loyalty Factor:** survey helps to induce the caller for *repeat* business, usually spawned by a 'high-buyer' or would refer others reply

**3. Customer Satisfaction:** typically measures one aspect or one purchase *experience* capturing customer-centric feedback

**2. First Call Resolution:** percent of calls with issues resolved or purchase made on the initial contact

**1. Quality Interaction:** monitoring the skills and knowledge of inbound calls

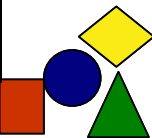


# I want 1<sup>st</sup> call! how your caller measures FCR %

Each Agent takes 1000-1200 calls per month

Industry	FCR %	Call = type of Business
Catalog Retail	79%	<i>Sale to a skew #</i>
Health Support	76%	<i>Review benefits booklet</i>
Govt Local	67%	<i>One person SME</i>
Insurance/ Bank	66%	<i>Transfer, on hold, not my area, cannot see billing</i>
Not for Profit/ Help Desk	59%	<i>Info only to repeat call, Take work order- pass on</i>

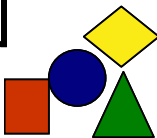
Resource: BenchmarkPortal 2009



# When your caller measures FCR %

Each Agent takes 1200 calls per month x 60 Agents x %

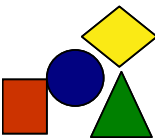
Catalog Retail	79% x \$50	\$756,000 /month lost \$ sales opp
Health Support	76%	Loyalty?
Govt Local	67%	Trust?
Insurance/Bank	66%	Recovery?
Help Desk	59% x volume/m 29,520 repeat x \$10	\$295,200 to take a 2 <sup>nd</sup> call



# STAR Model for Agents to earn 'IT'

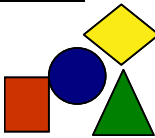
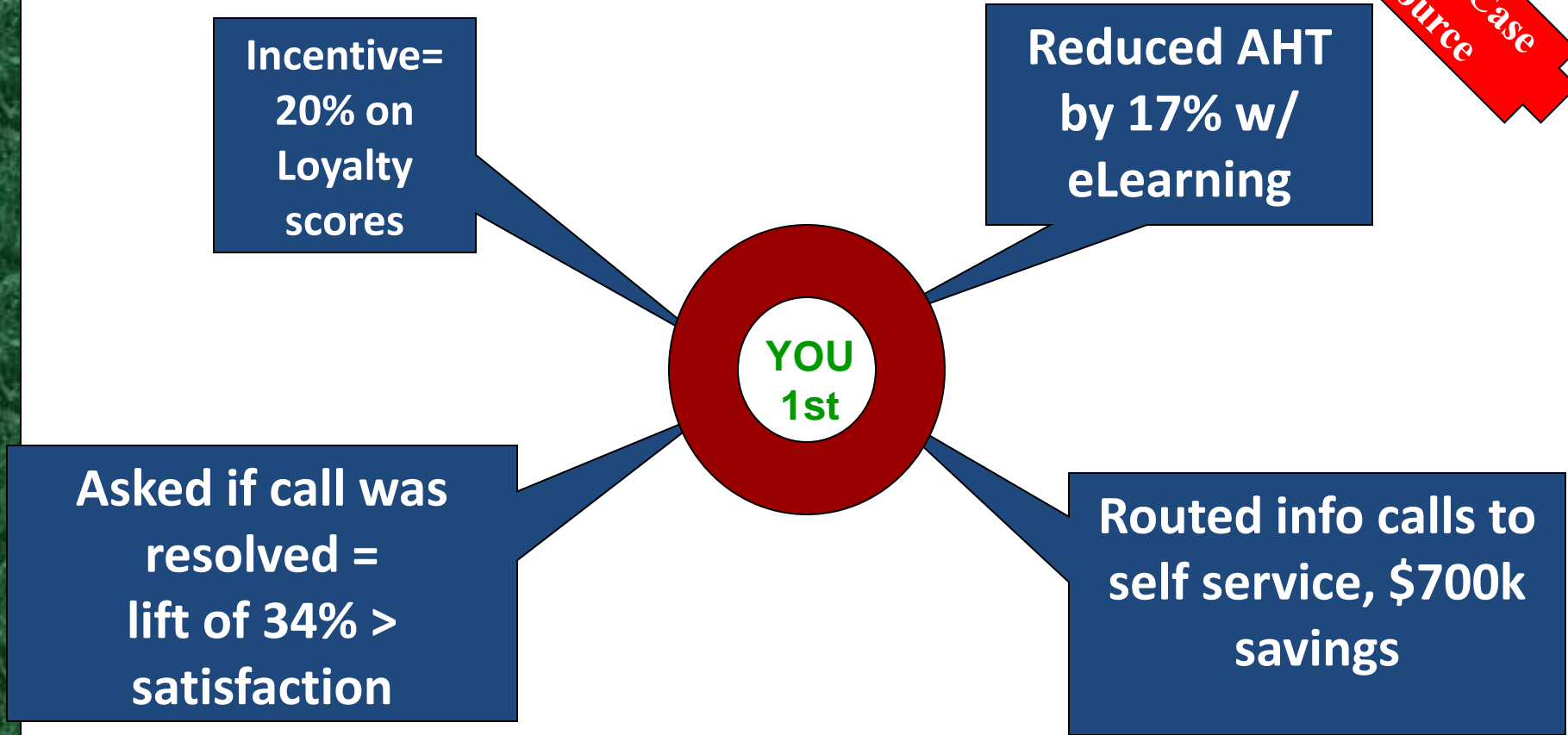
- **S**elect                      Attraction                      HRM
  - **T**rain                        Education                        KM
  - **A**ction                      Communication                    PM
  - **R**eward\$                    Supervision                      QM + C-sat
- 
- How to set Re\$olution as a Goal?
    - Behaviors, Segmentation, Cause and Effect, Predictive Analytics . . .
    - .

*Resource: How to Audit your Call Center: A to Z, Exhibit F*



# Share your Success Story

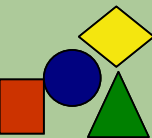
Business Case resource



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## Bonus: Re\$olution to ACT on IT

1. Give each dimension a 'grade' from A to D
  2. What is **'IT'** you might do different?
- Write your ideas, new knowledge, and solutions



# Bonus: Engaged!

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## *How you align -- Agent*

- Select Agent talent on criteria-based competencies
- Implement tools for knowledge

## *How you excel -- Business IQ*

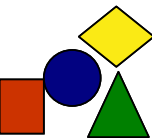
- Review scorecards, streamline performance

## *How to use feedback – Customer*

- Enhance service excellence for loyalty

## *How to support – Systems*

- Optimize scheduling and self-service initiatives



# Can I have ReSolution? *Feedback & action*

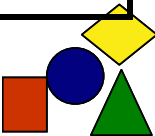
	Agent	Business	Caller	Systems
Grade				

<b>Agent Knowledge</b>	<b>Callers Loyalty C-Sat</b>
<b>System Quality + phone</b>	<b>Business IQ Data- ROI</b>

What is 'IT' – FCR?

- What is your need
- Ask a question
- Give an example
- How to measure
- What \$ saving reward

*Send me your QM form for FCR evaluation*



# Thanks for your attention!

To WIN?  
Send me your  
ABC's grade, question,  
your QM, C-Sat form  
By 2/1

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*To Optimize your Best Practice  
in Customer Service*



4D Clinic, 2-days in April, coming to N. Cal

