# A prescription for

## Contact Center Agent Metrics

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*"The way you see people
is the way you treat them,*

*and the way you treat them
is what they become."*

*—Johann Wolfgang von Goethe*

as people leaders
our actions and influence
<span style="color:red">matter</span>


**a teacher's tale**


inspiring *one degree of movement*

# behaviors drive results – the health analogy

▶ Four pillars of health

  ▶ Complete Nutrition

  ▶ Regular Exercise

  ▶ Recuperative Sleep

  ▶ Stress Management

▶ and all of the foundational behaviors that support them

# The evaluation obligation – ground rules

- Don't drive the wrong behaviors or do these other things
  - No double dinging or piling on
  - No bell curves  - abundance
  - No metrics out of the agent's control
  - No rules that are punitive for everyone because of one person's misconduct
  - No metrics described as either "Draconian" or "Machiavellian"
  - No reliance on administrative heroics or dirty data
  - No aspirational goals without a path to achieve them – no "hope"
  - No driving unintended or unwanted behaviors

- Clean up your evaluation metrics
  - **A**ssess the real impact to the mission of the business
  - **B**e fair and consistent
  - **C**onsider your culture and values
  - **D**efine what right looks like
  - **Focus on the behaviors because they will drive the right business result**
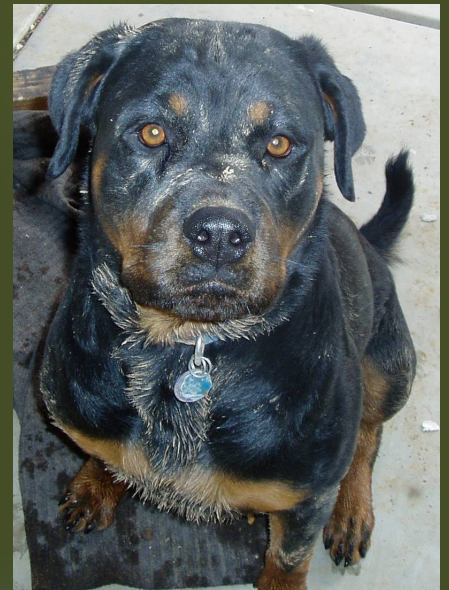
- Avoid using metrics like these
  - abandonment rate
  - average handle time
  - shrinkage percentage
  - service level agreement
  - occupancy percentage

- They are all important measurements, but
  - your agents don't control them
  - they drive the wrong behaviors
  - you cannot credibly defend them in a coaching interaction

# Use metrics like these:

► Time management
  ► attendance
  ► schedule adherence

► Quality
  ► call monitors
  ► voice of the customer – surveys

# Time for service – Attendance

▶ The real cost of absenteeism is in lost productivity and reduced morale. This applies to all of the people in the business who touch the attendance process

  ▶ the agent with the problem

  ▶ the agents disenfranchised by the agent's problematic behavior

  ▶ supervisors, reporting, HR, WFM

▶ The difference between a real business problem and something else

▶ Consider the 20/80/20 rule of managing people

# The _____ company attendance policy excerpt

- ▶ What the policy actually said:
  - ▶ Punctuality –
    - ▶ 5 minutes or more, but less than 2 hours for a shift start or lunch return is considered an "incident"
    - ▶ 8 incidents in a rolling 12 month period may result in termination
  - ▶ Attendance –
    - ▶ 2 hours up to 3 days is considered an "occurrence" (Three days or more requires a doctor's note)
    - ▶ 8 occurrences in a rolling 12 month period may result in termination

- ▶ Observations
  - ▶ This company spends ~$20,000 to onboard and train an agent, for 40 minutes in a year may terminate them
  - ▶ Missing 10 minutes or 100 minutes has the same weight in progressing in the corrective action process
  - ▶ The care and feeding of the minute by minute misses is a costly diversion from taking care of customers

# Time for service – attendance

► The traditional process

  ► Track the number of incidents and occurrences based on your definition

  ► Create a matrix showing corrective action progression based on the number of incidences or occurrences in a defined timeframe

► Evolve

  ► Define the number of minutes for "punctuality" and the number of minutes for "attendance"

  ► Consider the amount of attendance time missed – not how many widgets of time were missed

  ► Allow the agent to "pay" for missed time with accrued benefit time - PTO, Vacation time, or Floating Holidays.  They earned it – let them use it – make the required adjustments in shrinkage during your forecast planning process

  ► Define what constitutes a problem and have a coaching/corrective action process to address it

  ► Generally people care about one or more of the following things – find out which one moves them to better behaviors and coach to it

    ► Self – their personal responsibility and performance result

    ► Team mates – how does their absence impact others

    ► The business itself – customers, having a job, maybe getting a bonus

  ► Train them on the impact of absenteeism - the power of one

# Time for service – punctuality

► Break out of the traditional method of counting minutes

► Absorb the traditional tardy/punctuality metric into the metric for strict schedule adherence

► Here's how:
  ► Define the number of minutes for "punctuality" and the number of minutes for "attendance"
  ► Stop adding segments for punctuality misses in your WFM system
  ► Let the time negatively impact the agent's strict adherence metric

► Here's why:
  ► Tracking this time requires a lot of administrative time for transgressions that have small impacts on the business
  ► The behavior will get captured and coached within the proper metric

# Time for service – schedule adherence

▶ Adherence – did the business get what it paid for?
  ▶ The percentage of phone time schedule that was worked
  ▶ This one is fairly straightforward – for example
    ▶ Breaks that start late, end late, balancing the time

▶ Strict Adherence  – were you there when I needed you?
  ▶ The percentage of phone time worked within the scheduled time
  ▶ Considerations for setting a goal
    ▶ Average handle time
    ▶ Number of scheduled off-phone activities during the day
    ▶ Administrative effort making adjusting for late breaks

▶ Never, ever, ever rely on that magic number of minutes people love to quote…  ever!

# Monitor Quality

- ▶ Provide appropriate structure
  - ▶ Document what attributes define desired behaviors
  - ▶ Avoid rigid scripting, except for legal disclosures, allowing the agents to have a natural conversation with their customer
  - ▶ Provide examples of what right does and does not look like

- ▶ Use a varied approach to monitoring for quality
  - ▶ Conduct monitoring sessions using recorded calls
  - ▶ Have the agent score their own call
  - ▶ Calibrate with the leadership team to promote consistency in evaluations
  - ▶ Monitor agents side-by-side and remotely
  - ▶ Take a few calls yourself and let your agents evaluate YOU

- ▶ Before we see a sample of a behavior driven Quality Monitoring form,
  let's look at a customer's expectation

Customer expectation:

# help

# Monitor Quality

| | | Unacceptable | Needs Improvement | Meets | Exceeds | Outstanding |
|---|---|---|---|---|---|---|
| 1 | Verbal misconduct - rude, inappropriate language | Automatic | ✔ | ✔ | ✔ | ✔ |
| 2 | Technical misconduct – phone manipulation, system fraud | Automatic | ✔ | ✔ | ✔ | ✔ |
| 3 | Clarifies and confirms understanding of the caller's needs | | | | ✔ | ✔ |
| 4 | Professional communication including proper hold and transfer technique | | | | ✔ | ✔ |
| 5 | Provides complete and correct information to resolve caller's needs | 0-2 of these behaviors are met | 3 of these behaviors are met | 4-5 of these behaviors are met | ✔ | ✔ |
| 6 | Navigates and documents the system properly | | | | ✔ | ✔ |
| 7 | Provides first call resolution | | | | ✔ | ✔ |
| 8 | Defusing and/or de-escalating a caller to prevent an escalation | | N/A | | One is met | Two are met |
| 9 | Resolving an unusually complex issue | | N/A | | One is met | Two are met |
| 10 | Demonstrates excellence to satisfy a caller and prevent a callback | | N/A | | One is met | Two are met |

SAMPLE