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Call Center Supervisor Best Practices

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Executive Summary

Today's call center supervisor is routinely expected to be a combination of expert service provider, coach, trainer, mentor, motivator and manager. Compounding this already significant challenge, supervisors are expected to put out daily fires, prepare reports for management and oversee agent performance across multiple channels of interaction, including telephone, e-mail and chat. In this demanding environment, it is difficult—but imperative—for often overextended call center supervisors to learn best practices and to acquire the skills and techniques that enable them to achieve and even exceed their goals.

Call Center Supervisor Responsibilities

Call center supervisors are expected to be “renaissance people” who excel at a variety of roles and responsibilities. They must be excellent multi-taskers, combining the ability to manage and coach agents, handle challenging customers, readily shift priorities, prepare management reports, and lead call center initiatives while ensuring that service level and quality objectives are achieved. Supervisory job responsibilities change frequently, but generally include the following tasks:

- ✓ Meet monthly key contact center performance goals for customer satisfaction, quality, productivity and key performance metrics.
- ✓ Monitor and evaluate agent monthly performance, including call/email and after-work monitoring (using call recording and quality assurance applications), review productivity and attendance reports, and coach staff members to improve performance.
- ✓ Conduct formal agent performance reviews, including annual goal-setting/performance development plan, mid-year performance review, and final year-end performance review. Assist agents with career development.
- ✓ Ensure that customers' questions and problems are resolved properly and quickly. Address challenging customers and problems that require escalation outside of the department.
- ✓ Report, analyze and resolve system, customer and operational issues that impact service quality. Strive to provide all customers with an outstanding customer experience.
- ✓ Build, establish and maintain open lines of communication with agents, peers, trainers, managers, QA specialists, Engineering, Marketing, Manufacturing and other areas of the company to facilitate problem solving.

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Helping Agents Succeed:

When a supervisor sat down to speak with an agent who had an ongoing punctuality issue, the supervisor discovered that the agent knew only one route to travel to work. The supervisor helped the agent plan different routes and the agent's tardiness issue was resolved.

- ✓ Stay informed of all new products and services and ensure that agents are properly trained to handle questions about any of them.
- ✓ Support and promote all company and departmental sales, service and quality initiatives.
- ✓ Interview and hire prospective agents, technicians and senior technicians.
- ✓ Assist in administering team attendance records, salary plans, vacation and staffing schedules and forecasts.
- ✓ Build and maintain a positive working environment that attracts and retains high-quality staff.
- ✓ Be visible to agents. Supervisors should walk around periodically to perform live monitoring of agents, compliment agents for on-the-spot performance, and assist agents struggling with calls.
- ✓ Plan and manage a range of non-phone activities for agents, including workshops, call center cross-training, eLearning courses, knowledge reinforcement and brainstorming sessions.

Building a Welcoming Work Environment

Supervisors set the tone for their team. The most effective supervisors create a welcoming work environment by establishing a rapport with their agents that encourages teamwork, creativity and excellence. When agents feel that they are valued, respected and treated fairly by their management, they will be highly motivated to perform well and deliver outstanding service to their customers. Agents' jobs are often demanding and stressful. Supervisors can relieve the tension by creating a positive, supportive and collaborative environment.

Best Practice Clip

The Personal Touch Makes a Difference:

A highly respected and successful call center manager motivated her staff by acknowledging them personally. The manager learned each agent's name (even though there were hundreds), walked around the floor to greet each shift, acknowledged agents in the hallway or elevator, and established a call center break room with phones and vending machines to help agents enjoy their 20-minute break time.

Training Builds Staff and Customer Satisfaction

Training plays a major role in building a positive work environment and is essential for the success of all call centers. Agents want to do a good job and appreciate it when an enterprise invests in their success. Training is necessary to prepare agents and give them the information and skills they need to sell, accurately address customer inquiries or questions, and efficiently navigate systems to access information and correctly process transactions. It is also essential to teach agents to interact with customers professionally, to inspire confidence, and to deliver an outstanding customer experience.

Supervisors are involved in many aspects of training. They are often asked to participate in basic training classes as an instructor or assistant. They must identify specific training needs for each of their agents and then provide one-on-one coaching and recommend appropriate courses. They must also continuously monitor agent performance in order to provide feedback to trainers on ways to enhance courses. Supervisors are often subject matter experts and should participate in developing and delivering training content to agents. The following is a description of common call center training courses.

Basic/Introductory Training

Basic training, which generally lasts 3 to 6 weeks, encompasses many topics and is intended to teach new agents about the enterprise, its products, services, procedures and systems. It also teaches agents communication skills so that they know how to interact effectively with customers. Most basic training courses include these modules:

Enterprise/Contact Center Overview. A high-level overview and brief historical background of the company, mission statement, scope of products and services, overall organization structure, brand awareness, service philosophy and values; a review of the contact center environment, functions within the contact center, departmental organization structure, interfacing departments, and high level explanation of contact center technology and systems (how calls/emails enter, IVR, call queuing/routing, servicing channels, etc.)

Products and Services/Policies and Procedures: In-depth coverage of all products and services offered by the organization and supported by the contact center; detailed coverage of policies, procedures and guidelines that agents are required to adhere to when processing transactions or advising customers.

System Training: How to access and navigate computer and phone systems, how/where to obtain information and help, and how to process transactions.

Communication Skills: Basic instruction and role play on key elements of interacting with customers, including respect, courtesy, professionalism, communicating difficult concepts, handling customer complaints and dealing with frustrated customers.

In many call centers, agents who complete basic training are put into a “protected” environment for the next four to six weeks, where a high supervisor-to-agent ratio ensures that an expert is available to provide assistance and support whenever needed. This is a proven and effective approach for making agents productive as quickly as possible. While this training investment may seem high, it’s important to recognize that new agents are often overwhelmed by the volume of information and system knowledge that they are required to master in order to perform their jobs. Agents who are in a comfortable work environment and feel supported are more likely to be productive and satisfied with their jobs. When agents are happy, they share their satisfaction with their customers.

Agents, as well as all staff members, need to clearly understand what is expected of them. Some organizations discuss departmental goals with their agents during the basic training class. However, if the agent’s goals are not addressed in a formal setting, it becomes the supervisor’s responsibility to communicate this information. It is important for supervisors to review the department’s QA criteria and performance management goals with their agents so that they have a clear understanding of how they are being measured and evaluated. Agents who know what is expected of them are more likely to perform well.

Quality Assurance Criteria: In-depth coverage of the quality monitoring process, including quality criteria, frequency and number of evaluations conducted, scoring methodology, how to access, review and respond to evaluations and quality monitoring goals.

Performance Management and Evaluations: A detailed review of contact center performance expectations and goals, including all KPIs and metrics (productivity, quality, sales, revenue, customer satisfaction, attendance/punctuality, etc.) upon which agent performance evaluations will be based.

Ongoing Training

The contact center is a dynamic real-time environment where constant change is customary, so agent training requirements do not end with a basic training course. Weekly or bi-weekly up-training courses are important for introducing new content or for reinforcing an existing process. This is a positive activity, as agents appreciate the opportunity to get off the phones, share and discuss customer feedback, and ask questions. Most call centers find that agents value up-training sessions, appreciate management support and are refreshed and enthusiastic about returning to their calls. Below is a list of common high-value agent training programs.

Up-Training: Ongoing courses that introduce new products or initiatives, new processes or changes to existing procedures, or changes to quality or performance goals/criteria.

New System Training: Explains the new system, its benefits and efficiencies, and provides agents with hands-on instruction on how to access, use and navigate the system.

Advanced Communication Training: Instructs agents on improving customer satisfaction, efficient call management techniques, defusing escalating situations, and dealing with challenging customers. This course is especially beneficial when offered to new agents a few weeks after they have completed the basic introductory course and have had some experience dealing with live customer issues on their own.

Specialty Training: Includes courses that are unique to the contact center operating environment and are targeted at improving specific skill sets, such as account retention training, effective sales techniques, overcoming objections, escalation team training, time management techniques, etc.

Creative Training Strategies

All too often, call center managers are expected to train their staff without sufficient resources or even a budget. This challenge, if approached creatively, can facilitate camaraderie within the call center and with other operating departments. When training resources are scarce, supervisors should ask team members or colleagues in other departments to participate in their training effort. This will give other departments an appreciation of the challenges that agents face on a daily basis. It also gives agents an opportunity to understand what goes on in other parts of the organization or in the greater community.

Agent Peer Training: Motivate agents to help each other and share suggestions for improvements. Pair up an agent who is having difficulty with one who consistently achieves. Set up an environment in which agents can learn from each other as much as possible.

Soliciting Input: Encourage frequent team meetings so that agents can discuss areas of difficulty and share techniques for addressing these issues.

Using Outstanding Performers as a Resource: Reward outstanding performers by inviting them to create and deliver training sessions. This is a highly visible way to recognize and reward outstanding performance. Agents will appreciate having some time off the phones and an opportunity to expand their skill set. This approach also yields the added benefit of creating subject matter experts who remain in the shop and are available to assist other agents on an ongoing basis, once the training is completed.

Best Practice Clip

Agent Participation Cuts Training Time:

A call center decided to implement a new application and enlisted the help of agents to design the application's Graphical User Interface (GUI). The participation of end users in the design phase meant that, when the application went live, agent training time was reduced and many common system and interface errors were avoided saving the organization time and resources.

Partner with Other Departments: Engage sales, marketing or other operating groups to help develop and deliver a training program, particularly if the content relates to one of their initiatives. Besides giving the call center additional resources, this practice builds cooperation between departments, helps achieve shared goals, and communicates the importance of the program to agents. Additionally, it gives the external department an appreciation of the call center and its agents.

Involve the Community: Contact colleges in the area to ask if they have an internship or student work-study program. In many cases, students can earn credits or fulfill course requirements while contributing to the success of the call center. This practice also promotes community relations and provides real-life work experience for students.

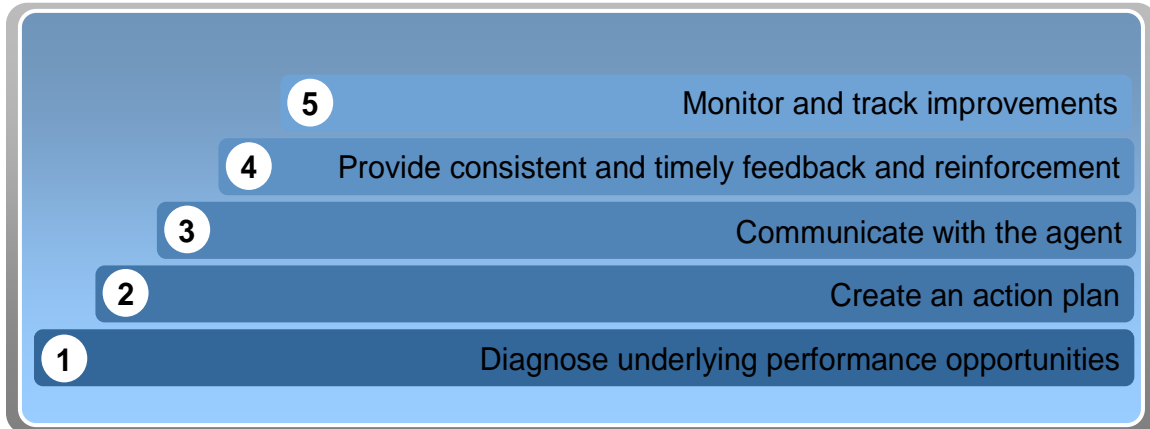
Coaching Drives Agent Satisfaction and an Outstanding Customer Experience

Formal training classes are a standardized, one-to-many mode of communicating product and system information. Coaching, on the other hand, is a great way for supervisors to devote one-on-one personalized attention to agents and is often considered the most effective method for training adults. Agents really appreciate receiving individual attention to learn what they are doing well and the areas where they can improve. Coaching also demonstrates that both the supervisor and the company are deeply committed to the agent's success and lets agents know that their contribution is an integral part of the call center's and company's success.

Coaching is often challenging for supervisors, who were promoted for their expertise in interacting with customers and providing outstanding customer service, but were not trained to coach agents. The ability to coach is not an innate skill and generally has to be taught. The five-step process illustrated in Figure x below provides the building blocks for an

effective coaching program. As coaching is a critical contributor to successfully managing agents and improving their performance, all supervisors should be required to attend a class that teaches them how to interact individually with staff members. Any supervisor who has not learned how to coach should seek out training in this area, as is a useful career-building skill.

Figure 1: Coaching Building Blocks



Step One: Diagnose underlying performance strengths and weaknesses: Analyze the agent's evaluations to identify performance opportunities and trends. Determine if the agent consistently has low or failing scores in a particular category or for a specific call type. Are there multiple performance issues, i.e., deficiencies in communications skills or problems adhering to procedures, accessing information or processing transactions? You can also gain valuable insights by conducting a side-by-side session with the agent to view first-hand where and when challenges arise, or if work habits are contributing to his/her performance issues. Based on the results of the trend analysis and/or observations from the side-by-side sessions, identify the underlying causes of performance problems.

Step Two: Create an action plan: Once you know where the agent needs help, create an action plan to address the underlying issues. Begin by discussing your findings with the agent's supervisor. Work with the supervisor to identify all available resources that can be used to support the agent's development. This may include enrolling the agent in additional training or up-training sessions, providing reference materials or job aids, offering additional system or communication skills training, or regularly assigning time for the agent to sit with an outstanding colleague to learn the proper way to handle interactions.

Step Three: Communicate with the agent: Depending on the structure of your organization, either you (the QA specialist) and/or the supervisor should discuss performance issues with the agent in a private setting. Begin by making sure that the agent understands the quality evaluation criteria and how calls are scored. Be sure that your assessment is constructive and recognizes the agent's strengths, as well as performance opportunities. Review the action plan that has been developed and emphasize that it is intended to provide help and support.

Best Practice Clip

Personalized Coaching Shows that you Care:


A supervisor noticed that one of her agents was not performing up to her potential. The supervisor used the quality assurance process to diagnose the agent's underlying problems and then collaborated with her to create an action plan. The agent being coached wrote a letter to human resources explaining that the coaching process had motivated her to perform better. In the past, the agent explained, she had only been told that she was doing something wrong; now there was someone on her side to help her improve. The personalized and targeted feedback enabled the agent to rapidly correct her issues and become a positive influence in the department.

Step Four: Provide consistent and timely feedback and reinforcement: The most effective improvement programs foster ongoing communication. When an agent is struggling to perform, it's a good idea to offer him/her some extra input. Conduct routine evaluations of the agent's calls and provide timely feedback. When needed, offer additional targeted coaching that addresses the agent's specific needs and reinforce what he/she is doing right. In general, agents welcome feedback, particularly if positive behavior is emphasized as much as areas needing improvement. Most people want to do a good job, but are sometimes unsure about the best way to handle challenging situations. Share best practice calls with agents to recognize excellence and encourage the right behavior and performance. Give your agents tips to help them improve productivity, quality and customer satisfaction.

Step Five: Monitor and track improvements: Monitor the agent's performance and track his/her progress. Motivate the agent by recognizing and praising incremental improvements and continue to provide coaching and support for performance opportunities.

Coaching should be instructive, supportive, collaborative and motivating, not confrontational or admonishing. Here are additional best practices that supervisors can use to augment the five-step coaching process:

Figure 2: Additional Best Practices for Conducting Successful Coaching Sessions



Additional Best Practices for Conducting Successful Coaching Sessions

1. Always deliver coaching in a private setting to maintain confidentiality and avoid outside distractions and interruptions.
2. Begin coaching sessions on a positive note, highlighting agent strengths and recognizing incremental improvements.
3. When discussing performance opportunities focus on specific examples and detail why the agent did not meet the performance standard.
4. Provide the agent with specific examples of how the situation could have been handled better, i.e., “Maybe a better way to explain this to the customer is to say...”, or, “This information can be found on this screen.”
5. Encourage open dialogue by asking the agent to talk about areas where he/she is having difficulties and discuss what kind of support would be most helpful.
6. Establish incremental goals for the agent to achieve for the next coaching session.
7. End the session on a positive note.
8. Follow up as planned on any deliverables.
9. Provide informal support between coaching sessions. Drop by, listen for a few minutes, and provide encouraging support. A few kind words can have a significant positive impact.

Using Rewards and Recognition to Enhance the Operating Environment

Supervisors, as the frontline managers, are responsible for keeping the department operating smoothly and the staff encouraged and ready to work. Supervisors can create a strong sense of job satisfaction and keep agents motivated by recognizing, communicating and rewarding performance excellence. Finding an effective way to reward agents can be challenging for supervisors, particularly if the budget is tight; developing the “right” rewards program is also challenging because people are motivated differently. While financial rewards are always

appreciated, they're not always possible. When this is the case, there are many creative and low/no cost ways for supervisors to recognize and reward their staff. A few approaches are:

- Accommodate shift changes and vacation requests based on an agent's overall performance, not just tenure. Prioritizing requests based solely on seniority sends the wrong message and discourages agents who have been on board for shorter periods of time.
- Allow agents to make decisions within set parameters wherever possible. For example, it is demoralizing for the agent, and distressing for the customer, if a call has to be transferred to a "retention" specialist just to have a fee removed; train all agent groups to handle these calls. Agents will welcome the opportunity to be able to handle transactions that they previously had to transfer, even if the parameters of their authority are limited.
- Encourage agents to excel by allowing top performers to participate in a variety of contact center initiatives. Invite your most outstanding agents to take an active role in departmental activities, such as coaching new hires, delivering up-training sessions, becoming subject matter experts, or cross-training on a new function.
- Allow agents to choose their own rewards—for example, gift cards (a favorite retailer or restaurant), movie tickets, lunch vouchers, passes for a day off, or first choice for a vacation request.
- Create a call center "rewards program" where agents can accrue "points" for performance and "redeem" them based on achievement level.
- If the use of remote agents is a viable option, include working from home as an alternate way to recognize top performers.

Best Practice Clip

Finding the "Right" Incentive:

A call center was having difficulty getting agents to agree to overtime. Even the prospect of overtime pay was not enticing a sufficient number of agents to meet the needs of the department. Finally, a supervisor decided to offer gift cards to local retail stores as part of the overtime package. This strategy succeeded in convincing many agents to volunteer for overtime. The agents saw the overtime pay as their "due," but the gift cards as a real incentive.

- Allow agents to choose their lunch hours, headsets and menus for recognition day events and similar activities.
- Each month, recognize top performers in the call center newsletter or by establishing an "Agent Hall of Fame." People really do like seeing their name engraved on a plaque. This may cost a few dollars, but the benefits are high.

- Establish reward “perks” specific to your environment. For example, one contact center with a limited number of parking spaces close to the building assigned top performers their own spot for a week. Adding the winner’s name to the parking spot enhances the recognition. (Small things often go a long way, as they show that management cares.)

Supervisory Management Tools

A call center can provide excellent service and manage its staff without any applications. Call center applications, however, use automation to allow supervisors and managers to efficiently and effectively standardize and improve agent productivity and quality, identify trends, manage agent performance, improve the customer experience and drive agent and customer satisfaction. Among the applications that assist in managing and improving call center operating environments and staff performance are: Quality Assurance/Recording, Call Center Performance Management (CCPM), Speech Analytics, Surveying, eLearning, and Coaching. Figure 2 below provides an overview of these applications, their uses and benefits for supervisors, agents and the overall call center:

Figure 3: Applications and Benefits

Use/Purpose	Benefits		
	Agent	Supervisor	Call Center
QM/Recording			
<p>100% voice/data recording of interactions for regulatory compliance, customer satisfaction & agent performance. Measures agent adherence to established policies and procedures. QM/Recording facilitates revenue generation by capturing customer insights about products and services; identifies missed sales, retention and other opportunities.</p>	<ul style="list-style-type: none"> Provides consistent, frequent and specific in-context feedback to agents on quality of performance. 	<ul style="list-style-type: none"> Automates the QM process. Allows supervisors to target specific performance/training opportunities. Allows managers to readily identify top/poor performers. Provides automated data tracking, trending and reports to senior management. Allows manager to rapidly identify trends and training opportunities. Provides consistent, frequent and specific in-context feedback to agents on quality of performance. 	<ul style="list-style-type: none"> Improves QA effectiveness and efficiency. Allows center to focus monitoring on high-impact interactions. Manages customer experiences. Gauges customer reactions to processes and policies. Identifies opportunities for process improvement. Reduces risk by managing regulatory compliance disclosures. Increases agent satisfaction and retention.
Performance Management			
<p>Scorecards and dashboards developed for agents, teams, groups, centers, sales, marketing and executives. Many PM applications can automate reward and incentive programs and the performance evaluation process.</p>	<ul style="list-style-type: none"> Provides continuous feedback. Increases agent awareness of goals and how well they are being met. Motivates agents to manage their own performance. Improves agent performance by increasing adherence to departmental goals. Improves agent morale and satisfaction. 	<ul style="list-style-type: none"> Provides holistic and balanced views of agent and team performance. Automates the evaluation process. Provides real-time, objective data, allowing supervisors to identify and reward outstanding performance. Reduces data gathering time. 	<ul style="list-style-type: none"> Aligns the objectives of the call center with the goals of the company. Improves agent and supervisor productivity. Reduces the cost per transaction. Increases utilization of staff. Eliminates unproductive activities.
Surveying			
<p>IVR, e-mail & Web-based systems that survey customers and</p>	<ul style="list-style-type: none"> Allows agents to view the impact of their performance from the 	<ul style="list-style-type: none"> Measures agents' impact on customers. Allows managers to 	<ul style="list-style-type: none"> Offers rapid and automated tracking and trending of

Call Center Supervisor Best Practices

Use/Purpose	Benefits		
	Agent	Supervisor	Call Center
employees to gauge satisfaction levels.	customer's perspective. <ul style="list-style-type: none"> • Provides agents with a vehicle to voice their opinions on the work environment. • Improves agent satisfaction. 	rapidly respond to at-risk customers. <ul style="list-style-type: none"> • Facilitates rapid resolution of problems that result in customer dissatisfaction. 	customer/ employee feedback to measure satisfaction. <ul style="list-style-type: none"> • Aligns customer satisfaction with internal quality measurements. • Identifies customer and employee dissatisfaction drivers. • Reduces customer and agent attrition. • Improves customer satisfaction & loyalty.
eLearning			
Learning management systems (LMSs) used to author, deploy, track and store in-depth training classes.	<ul style="list-style-type: none"> • Provides accessible, individualized agent training. • Supports and encourages agent development based on specific performance data or development plans. • Allows agents to measure impact of training on performance improvement. 	<ul style="list-style-type: none"> • Allows managers to rapidly deploy targeted training content based on QM evaluations, customer surveys, or departmental needs. • Automates status and tracking of training completion and measures post-course performance to determine training effectiveness. 	<ul style="list-style-type: none"> • Reduces training costs. • Improves training effectiveness.
Coaching			
Tools for creating and deploying coaching sessions, communications or best practices for agents.	<ul style="list-style-type: none"> • Reduces talk, work and hold time by giving agents information required to handle calls and the skills to address them more efficiently. 	<ul style="list-style-type: none"> • Allows supervisors to rapidly and effectively communicate with agents, facilitating frequent, consistent coaching. • Enables supervisors to share best practice clips with agents. • Enables recognition of service/call excellence. 	<ul style="list-style-type: none"> • Reduces costs. • Increases productivity. • Increases first call resolution (FCR) and customer satisfaction.

Source: DMG Consulting LLC, July 2007

Conclusion

Supervisors drive the success of call centers. They are responsible for keeping the department operating smoothly, meeting service delivery and quality goals, handling customer complaints and escalated calls, managing agents, and setting the overall tone for the department. It is a demanding job with a great deal of responsibility. Outstanding supervisors are highly respected by their staff and recognized by management. This often leads to promotions both within and outside of the call center. Employing best practices enhances supervisors' performance, increases the effectiveness of the call center and improves the customer experience. Following these guidelines also helps supervisors stand out and be recognized for doing an outstanding job.

About DMG Consulting LLC

DMG Consulting LLC is a strategic advisor to companies large and small. Our mission is to help companies build effective contact center and service environments that provide an outstanding customer experience. We achieve this goal by helping our clients leverage technology, process and people to optimize operational efficiency, sales and profits. Our actionable strategies and tactics effect change in clients' internal process and technology to maximize the returns from all customer-facing activities - sales, marketing and customer service. Our customers include Global 2000 companies such as Nortel, RealNetworks, Sub-Zero/Wolf, Stride Rite, Sun Microsystems, Carlson, J. Jill Group and HBCS.

DMG Consulting LLC's business strategists have an average of 20 years experience in customer relationship management (CRM), contact centers, building customer-focused businesses and financial analysis. We appreciate the complexity and unique challenges contact center managers and supervisors confront on an ongoing basis. Our actionable strategies and tactics will enable you to convert from a reactive cost-oriented service environment to an essential corporate player.

Our experienced staff bring a combination of hands-on expertise, training know-how and outstanding presentation skills to every engagement. We will assist you in cost effectively exceeding your customers' expectations.