



Delivering Service Excellence in Your Contact Center

A PSCU Best Practices Guide

Introduction

In this guide, PSCU presents a step-by-step approach to boosting employee engagement in a contact center environment. Through the best practices outlined here, you'll discover ways to set positive coaching goals and objectives, use workforce management to your advantage and properly maintain quality assurance (QA) standards.

The Importance of Employee Engagement to Contact Center Success

Employee engagement does more than just boost productivity; it helps a person draw meaningful connections between their job and the purpose served by their organization. And while every department within an organization should operate under the premise that they are only as good as their people, this philosophy is particularly critical in a contact center environment.

It's no secret-contact center agents have especially demanding roles, where high volume and mood variation among callers can leave team members feeling under-appreciated and overworked. But there are some best practices that you can put in place that will help create fully engaged agents and elevate the overall success of your contact center.



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"As contact center leaders, PSCU leverages innovative technology on behalf of our credit unions. We realize the path to unparalleled member experience includes the right people and the right solutions."

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Employee Engagement in the Contact Center

What makes an engaged employee, you might ask? An engaged employee is one who is fully vested in and optimistic about their work, and who takes decisive actions to further the organization's reputation and interests in a positive way.

Define the “Why”

Engaged employees are motivated to support the mission, vision and core values of a company by giving their best effort each day. But first they must understand the “why” behind decisions. This is vital to helping them feel a part of the process and empowered to make a difference in the lives of others. As you might imagine, transparency is key in defining the “why” of decision making. It's a constant work in progress, requiring open lines of communication from within all levels of an organization.

In a 2020 Contact Center Challenges and Priorities survey, it was discovered that improving employee engagement was a top-three priority for contact centers. When contact centers tackle attrition through engagement, representatives feel happier with their jobs and with their companies.

Involve Employees in Decision Making

Employee engagement results from doing the little things, as well as the big things right. This includes employee involvement in decision making. For every new practice or procedure put in place, leadership should first be required to think about the impact it will have on employees. Additionally, employees should be asked for their feedback on new processes, and included in roundtable discussions and surveys to help them feel heard. Once employees understand that their opinions matter, overall engagement will naturally increase.

Hold Employees Accountable

While we all seek to work in “nice” environments, it's important to note that being “nice” by itself is not always enough to boost employee engagement. You must hold people accountable for achieving performance expectations to fully reap the benefits of engaged employees. Career pathing and job-shadowing programs are one of the best ways to help employees reach professional goals, while a positive coaching culture will help grow employees' desire to contribute their best efforts daily. This means you must establish a process for reviewing quality assurance (QA) data and place special emphasis on specific, positive praise related to their performance. Be ready to discuss the data, trends and action-steps you want taken to support the overall needs of the organization.

In the State of Employee Engagement 2019 survey, sponsored by Glint, it was noted that 70% of respondents say employees bear a high or very high degree of responsibility for engagement. This result points to the need for a culture that holds employees accountable for their own engagement, and delivers reciprocal results of personal empowerment.



Example: PSCU's Positive Coaching Culture (PCC) Goals and Objectives Process

Quality Assurance (QA)

- Agent reviews their QA Data prior to the coaching conversation.
- Agent conducts self-assessment regarding what is working well and potential opportunities for improvement.
- Supervisor prepares to discuss the data, trends and any positive action that might need to be taken or support that might need to be given.

Coaching Conversation

- Standard coaching session will be scheduled for 30 minutes, twice each month per agent.
- Supervisors and agents all follow the standard PCC coaching conversation format to ensure consistency across the organization.
- Format will be a combination of observations, questions and supportiveness.

Take Positive Action

- Agent will propose specific development or other positive action that will be taken to enhance their performance.
- Supervisor will share observations/suggestions.
- Positive action is documented and the supervisor thanks the agent for areas of good performance.



Employee Engagement in the Contact Center



At this point, you may be wondering what the indicators are for a highly engaged contact center environment. Here are just a few of the ways you can measure your success:

- Positive member experiences
- High NPS scores
- High employee morale
- High employee retention

But long before any boosts in engagement or measurements begin, steps must be taken to become a destination employer. This means establishing visibility into your standards of excellence. People will seek to work for an employer that they are proud of and know is committed to doing the right thing for their employees and their members. Ask yourself these questions:

- In what ways do you give back to the community?
- Which holidays and special occasions does your team celebrate?
- Which inclusion and diversity initiatives do you support?
- In what ways or how often do you promote any of the above benefits?

If the answer to the last question seems fuzzy, now is the time to get out there and start touting the benefits of your contact center or working to create new benefits that will cultivate top performance!

Remember, assembly lines represent the opposite of a truly engaged workplace. You do not want your team members performing the same tasks over and over with little sense of accomplishment or value. Remind your employees that they are a vital part of the “whole,” and that their opinions matter. In time, you’ll see a shift in engagement that will bring a new level of success to your team and continued satisfaction to your members.





Workforce Management

Ask any contact center manager in any industry, and they'll tell you that the number-one goal for their team is to provide world-class service. It's an invariable response that beckons subsequent questions related to the what, how and why of workforce management in contact center environments.

In any capacity, proper workforce management is a driving factor behind great service. It's a term used to encompass initiatives related to the setup, planning, monitoring and analysis of contact center staffing and operations. At a more granular level, it includes forecasting, strategic scheduling and real-time management of contact center performance. Few would argue that operational agility and productivity are attainable without these measures in place. And depending on the size and complexity of one's contact center, workforce management (WFM) software may or may not be necessary to help get the ball rolling on the initiatives listed above. (As a general rule, the more call types and longer hours of operation a contact center has, drives the need for a robust WFM team & software). A variety of WFM vendors are available to suit any number of contact center environments, and options are easy to identify via a basic Internet search, although smaller centers that operate on fixed schedules and have more narrow skill-set requirements, may not necessarily need to invest in WFM software.





Define Your Identity

In determining where or how to get started with improved contact center operations, consider these four questions:

- 1 What are your primary goals?
- 2 Do you have sufficient resources?
- 3 How are your resources divided?
- 4 Does everyone on your team know their role?

Answers to these questions will help you define your identity and provide a foundation from which to implement solid workforce management. Be on the lookout for indicators of understaffing and poor strength pairing, as both are detrimental to contact center effectiveness. Long hold times that result from understaffing can create member frustration and employee burnout, both of which lead to poor service. Likewise, it's crucial to ensure that employees are paired to the call-level complexity that matches their training and experience. Take a moment and observe what's going on in your contact center; are your highest-trained employees taking low complexity calls and your newer, less experienced team members tackling more complex member inquiries? Assess your teams' skill set from an objective and honest perspective, and adjust accordingly to increase your service levels and productivity. In examining resources, be sure that you are also overscheduling for peak volume times of the day. When you align resources to your greatest points of risk, you're essentially showing your employees that you value their well-being as much as member satisfaction.



As you begin to map a plan for improved workforce management, you'll notice many opportunities for goal setting. It's very important to plan around current trends and the actual reality of your environment, not aspirations. Begin by reviewing previous performance, and share both the challenges and wins with your team members prior to setting new goals. Be sure to encourage open discussion on ways to improve and listen to feedback provided by the people responsible for engaging with members.

Take Action on Key Metrics

In moving forward with your improved plan for workforce management, be sure your team is keeping a watchful eye on the following key metrics, as doing so will help them achieve your service goals.

1

Average handle time

The time it takes to service a call from when it first gets answered until the agent is available to answer the next call.

2

Forecasted volume

The process a contact center goes through to define the amount of resources needed to handle expected contact volume.

3

Adherence/Compliance

The percentage of time agents adhere to their scheduled breaks, lunches and approved "off" phone time.

4

Occupancy

The percentage of time that agents actually spend handling incoming calls against the available or idle time, which is determined by dividing workload hours by staff hour.

5

Utilization

The most known definition is the percentage of time on a call divided by total time at work while being paid.



Next Steps Beyond Goal Achievement

Once it's come time to analyze your performance, you'll want to identify the primary factors that helped you achieve your goals, or those that contributed to some setbacks. It will be important to quantify those factors, not just list them, and adjust your existing plan going forward. Again, communicate your success and opportunities for improvement with key agents and team members, and be sure to engage them in any discussions pertaining to future goals. Part of effective workforce management is being a great "partner" to your agents and to other departments within your organization. This means exhibiting expertise by providing reporting and real-time analysis to those who may otherwise lack visibility into your day-to-day operations, yet benefit from having a whole-picture overview of the components that comprise your credit union's service deliverability.





Fundamentals of Quality Assurance

Another key aspect to delivering service excellence is quality assurance and the ways in which proactive monitoring can bolster the effectiveness of your contact center operations.

Define Quality

Let's start by thinking about the word quality. There are many degrees of quality that exist, and while it's the "good" form of it that every contact center strives for, it can be challenging to come to terms with the exact meaning of "good."

Simply put, "good" quality is defined by what you hope to achieve. And PSCU recommends that good quality measures are redefined often to align with business goals of the contact center. To take things a step further, you must incorporate key metrics, such as sales effectiveness and member satisfaction, into your program to successfully measure quality and the impact of your team's efforts. QA software can be a tremendous help in monitoring performance and gaining meaningful insights into your program's effectiveness. But before purchasing QA software, you'll want to make sure you consider its features, user-friendliness, cost, security and scalability. Overall functionality is a big factor in making the right QA software decision. A product that you can own and administrate according to your desired preferences, and without the help of IT resources or vendor consulting, will be far more beneficial than one that requires third-party assistance.

Four Categories of QA Evaluation

Whether or not you have QA software in place, you'll want to consistently approach quality assurance from four main categories of evaluation:

- 1** **Call Flow**
The consideration of the overall flow of the call to ensure members are assisted efficiently.
- 2** **Verification**
The process used to authenticate callers to gain access to their account.
- 3** **Soft Skills**
The standard for which callers should be treated.
- 4** **Procedure**
Ensuring agents are following internal and external processes and providing accurate and complete information.



With these four categories of evaluation in place, QA leadership can more easily review interactions and closely monitor performance to gain meaningful insights and ensure a consistent, positive member experience for callers.

Live Monitoring vs. Recorded Evaluations

Live monitoring of your agents' performance and recorded evaluations are equally important when it comes to quality control. Supervisors conduct live monitoring to provide agents with real-time feedback and the chance to correct behaviors instantly. In addition to live monitoring, floor walking or fly-by coaching also helps provide instant feedback to agents.

Recorded evaluations can also be utilized to provide feedback on soft skills. With this approach, however, greater focus is placed on adherence to procedures, identification of process improvements and risk mitigation.

Incentives Matter

The right combination of incentives and a positive coaching culture can keep contact center employees happy, but incentives, especially, should always remain a crucial part of the evaluation process. Ideally, agents are first paid on their skill sets as they relate to performance. Additional incentive programs have wonderful use, for reinforcing best practices and motivating agents for higher performance. If there are budgetary implications in offering incentives, remember that non-monetary incentives like flex-time, casual dress days, extended lunch hours and even visible trophies or accolades go a long way in helping your team maintain high levels of motivation.

Key Considerations on Quality Assurance in the Contact Center

Remember, the continuous cycle of data collection, analysis, training and improvements that are driven by QA, will result in satisfied members and great member service in your contact center. Also keep in mind, quality assurance is not successful without a partnership between departments. QA and Operations must work closely together to achieve desired results. Quality assurance as a whole, should determine best practices, identify possible opportunities and signal alerts on issues. Contact Center leadership ultimately holds the final responsibility, but owning outcomes and acting on them are based upon mutually agreed-upon recommendations.

Summary

As long as humans use phones, chat or other digital channels, companies will need to connect their customers and members with live agents. While AI-powered systems and phone trees can do a lot of the heavy lifting for basic contact center needs, there's something to be said for talking to a person who can understand a situation, especially when emotions are involved. This is where contact centers will remain a vital part of credit union service delivery. In short, your contact center or contact center services are an emotional component of your credit union brand. Your members' journey with people doesn't end after they join your credit union. In fact, the contact center may serve as one of the best-remaining opportunities to engage your members. And when credit unions invest in the training, engagement, QA and retention of their contact center agents, they are investing in satisfied members and future success. The formula is simple: Engaged agents mean happy members, and happy members lead to growth.



About PSCU

PSCU, the nation's premier payments CUSO, supports the success of 1,500 credit unions representing more than 3.8 billion transactions annually. Committed to service excellence and focused on innovation, PSCU's payment processing, risk management, data and analytics, loyalty programs, digital banking, marketing, strategic consulting and mobile platforms help deliver possibilities and seamless member experiences. Comprehensive, 24/7/365 member support is provided by contact centers located throughout the United States. The origin of PSCU's model is collaboration and scale, and the company has leveraged its influence on behalf of credit unions and their members for more than 40 years. Today, PSCU provides an end-to-end, competitive advantage that enables credit unions to securely grow and meet evolving consumer demands. For more information, visit pscu.com.