

2003 SOCAP Symposium & Technology Forum
Philadelphia, PA April 27 – 30, 2003

Monday, April 28, 2003

Keynote Speaker

Pat Croce: The Art of the Leader

The upbeat president of the Philadelphia 76ers shared his inspiring journey of success. He also included practical tips on how to score big in life.

Plenary Session I.

Richard Whiteley: ReSpiriting Customer Care

Customers define quality service by reliability, assurance, tangibles, empathy and responsiveness. Branded Customer Experience is the consistent, intentional delivery of your differentiated value through every interaction your customers have with your people, processes, products and services. Make your employees “Ambassadors of the brand” by translating the brand promise into behavior, developing consistency through standards, aligning committed and capable executives and managers. Implementation is as critical as content.

Drivers of Customer Loyalty: We have a brand identity that promises customers a unique and satisfying experience. The interests of employees are put ahead of the interests of other stakeholder groups. Customer-focused employee behaviors are rewarded. Feedback from customers is gathered using a variety of methods.

Drivers of Employee Satisfaction: The interests of employees are put ahead of the interests of other stakeholder groups. We work to develop products or services that are more appealing to our target customers than those of competitors. The company believes that giving customers a consistently superior experience will lead to profitable growth.

Plenary Session II.

Teresa Nasif: E-Gov Channel Convergence with a Citizen-Centric Focus

The President’s Management Agenda for E-Gov: Create a citizen-centric government, improve government’s responsiveness to the citizens it serves, improve government efficiently and effectiveness and transform how the Federal Government does business.

Federal Citizen Information Center (FCIC): It is a single location where people can easily access Government information.

- Consumer Action Handbook: Consumers request this book more than half a million copies annually.
- 1-800-FED-INFO: Answers questions and provides referrals on federal programs, benefits and services.
- pueblo.gsa.gov: Features *Consumer Information Catalog* and publications
 - Order publications online
 - Features product recalls and scams, consumer news and consumer calendar.
- consumeraction.gov: Web version of the Consumer Action Handbook
 - Links to consumer organizations, corporations and trade associations
 - Provides helpful tips on things like buying a car, using credit wisely, traveling safely and more
 - Features a sample complaint letter for consumers
- [Firstgov.gov](http://firstgov.gov): The portal to 186 million Federal and State Government websites
 - Provides easy, secure access to reliable government information and transactions never before available from a single location.
 - Transcends traditional government boundaries. Citizens no longer need to know organizational hierarchy or program names

FCIC provides information when citizens want it and in the format that’s easiest for them to use. It is a completely integrated program with a common architecture and established business process.

Luncheon:

SOCAP Contact Center of the Future Study: SOCAP presented the first look at this current study of inbound contact centers. This study was based on twelve major companies. There are five levels of the Contact Center Maturity Model that build on each other:

- Initial start up without process: centralized function to respond to customers and the work is not clearly defined.
- Basic/organizational knowledge: management begins to see the value of communicating with its customers and the work is more organized.
- Expanded/standardized: Management is supportive of the function and processes are documented, repeatable and measurable. Technology is integrated.
- Enhanced beginning of improvement cycles: Management views center as strategic advantage, processes rigorously are measured and technology selection is based on meeting customer requirements.
- Customer focused/improvement based: Management views center as competitive advantage and extension of the brand. Processes are continually evaluated and improved based on operational and stakeholder input. Technology is the enabler supporting data gathering/reporting integrated across the enterprise.

Results: over 50 percent are planning to expand to support business growth. They are expanding to improve operational metrics and service levels to meet customer requirements. They are also adding communication channels and technologies. Almost half need to add value with the same budget and one third need to provide current levels of operations and services with a reduced budget. Keys to making the contact center a success:

- Hire new, better trained, qualified, motivated people and more of them at every level.
- Use more of better and integrated technology.
- Be more customer centric and proactive, and less reactive.
- Provide more space and better space.

Workshops:

1. Dollars and Metrics and Values, Oh My!! A good manager must provide a strong balance through each of the core values of the brand through cost and quality. Managers need to work on the operational continuum: the core values/brand leads to expectations that lead to strategy, which ultimately leads to metrics and quality strategies.
2. Jump Starting Your Department's Strategic Focus: Strategic Planning has successfully shifted the mindset from short-term to long-term. Priorities and projects have shifted but strategic thrusts have remained the same. Calibration has ensured progress. Strategic focus requires ongoing commitment. Being strategic is a continuous process.
3. Doing More with Fewer Resources: Strategies for Improving Operational Efficiency & Employee Satisfaction: One area for significant cost-savings that is often overlooked is scheduling. Workforce optimization, improved customer service and the flexibility to meet changing business demands during uncertain times are critical elements to managing a cost-efficient operation. Effective labor scheduling is taking costs out of the business and improving profitability.
4. What are the RIGHT standards? Service standards help measure the "success" of the Consumer Affairs Department in meeting its overall objectives with both internal and external customers. Metrics should include both process metrics and out come metrics. Targets should be set on customer expectations, customer behavior and industry benchmarks.
5. 20/80 Versus 80/20: Customer Service Best Practice at "Touring Club Switzerland:" Being solution-oriented instead of problem oriented will create an reduction of fear in handling complaints. Include employee feedback in order to boost stimulation and interaction.
6. Unlimited Benefits from Limited Budgets: Customer Satisfaction drives shareholder value, one of the most important financial measures. To manage profits, manage satisfaction. Don't wait for customers to say it with lost sales. Understand current business to gain new business and avoid customer dissatisfaction. Remember, "very satisfied" customers are loyal. Loyalty leads to retention, which leads to lifetime value that leads to profits. Manage business results and metrics. Focus on management initiatives, which increase leverage. Build customer knowledge to

gain new customers while retaining your current ones. Build an enduring customer feedback system. Point of purchase, mailed surveys, web surveys, phone surveys focus groups and face-to-face meetings all add up. When you are on a budget, focus groups and face-to-face meetings will be the most gain for your dollar.

7. **Customer Experience Management: How I Learned to Stop Worrying and Love Complaints:** Build better business through customer experience. There is a goldmine of information that exists in your customer's feedback. Use that data to deliver the product, service and process innovations your customers desire, ensuring their satisfaction, loyalty and increasing your profitability. Proactively identify and remedy service deficiencies, liabilities or internal processing problems. Show shareholders, investors, media and industry analysts that your organization is investing in customer retention as a long-term business strategy. Establish potent "loyalty-based communities" of customers, employees and others who feel a tangible sense of "belonging" to your organization.
8. **Touch Point Optimization: Refocusing Customer Service through CRM:** This is a case study on DaimlerChrysler contact centers. Each contact center has opportunities to contribute key data elements if they are made available to agents. The definition of Touch Point Optimization is sharing of key customer and prospect data and actionable intelligence across customer touch points and media. The objective is to identify and implement opportunities to 'operationalize' the CRM philosophy with DDC customers and prospects, thereby enhancing the ownership experience, increasing purchase probability and reduce customer-acquisition cost. Touch point Optimization can provide significant value by providing near-term business ROI, increased revenue and quick hits. Leverage current investments in customer data, modeling and contact centers. Establish a model for assessing CRM ROI and focus future CRM investment priorities.
9. **Stellar Supervisors: Developing a Career Plan and Training Program for your call center Supervisory Team:** You need to find the right candidates through interviews, situational role plays, problem solving tests and 360 degree feedback instruments. An excellent call center supervisor needs to possess excellent knowledge of call center specifics. They also need customer service expertise by maximizing customer relationships and understanding lifetime customer value. They need to excel at general coaching, monitoring and calibration and coaching and motivating. Ultimately, they need management and leadership experience through organizational structure, project planning and management, budgets and finance, negotiation, problem solving, team performance management, time management and diversity.
10. **Crisis Management Simulation: Setting Up Your Early Warning Systems and Limiting Your Liability:** When dealing with a recall situation, never panic and stay calm. Bring in a recall team consisting of a recall coordinator, president/CEO, legal counsel, regulatory/technical and public relations. The team needs to work together to assess the situation and provide swift action through legal measures, actions within the company and the communications through the media. Develop a comprehensive plan, utilize expert resources, consider consumer and customer needs, update the recall policy and challenge the system and team.
11. **Teams are Dead: Long Live Teams!** Your customer relationships are dependent on your people relationships. The computing power of your staff is far greater than any CRM technology that you will be able to afford. In order to harness that power, you need an operating platform that utilizes the talent and power of your staff.
12. **Are you Serving All your customers? "No Hablamos Espanol":** The US Population is 13 percent Hispanic, which is roughly 13 million. Fifty percent of Hispanic Americans are online. The Spanish speaking population is growing and spending money. The solution is to grow your business. Finding bi-lingual agents are hard to find. You can build the capability yourself, but must be aware of different metrics. You can contract on an "as needed" basis. You can successfully outsource these calls across borders to Argentina.
13. **Managing Human Capital Through Situational Leadership:** There are four steps every good leader must make in order to become an excellent leader. Respect other people. Secondly, have a high expectation of them. The third is to understand the different styles of leadership and to apply the appropriate style to the situation at hand. Lastly, directive behavior by setting goals and objectives, set priorities and timelines and demonstrate to the subordinate how to do the assigned task.

Tuesday, April 28

Plenary Session I.

Janelle Barlow: Branding Your Service to Increase Sales & Build Loyalty: Emotional value can make or break a business. It is the monetary worth of the feeling that customers positively experience from using your products and services. In order to achieve satisfaction, HR and brand delivery play key roles. Service is a feeling. Customers are the reason we are here, and you will learn service skills while working here. Both you and a positive attitude need to show up at work. Through Volkswagen brand essence case study, Dr. Barlow explained the emotional value. VW vehicles are fixed right the first time, their vehicles return clean to the customer, they possess modern and clean facilities and appointments scheduled within a reasonable time.

Plenary Session II.

Arthur Shostak: Doing Better Business in the Near Future: Anticipating Tomorrow's Consumer: As consumer affairs and customer relations professionals, we must improve our forecasting abilities to better help and understand the consumers. We must prepare for the future by preparing to be surprised. 10 of the most significant changes likely to shape the early 21st century are:

- Aftermath of Iraq War
 - By 2030, Muslims are likely to be one-third of the world's population – and reconciling differences between them and the West may prove very difficult
- Life after oil – exploring new energy sources
 - The ever-dwindling supplies of oil and gas show we have 30 – 40 years left.
 - If the United States follows the European Union's example by switching to renewable fuels and develop a decentralized energy system reliant on fuel cells and hydrogen-based power.
- Global Climate change
 - Requires a well-thought-out environmental strategy
 - Improving Profitability and Public Relations, Sustainable Growth, Zero Toxic Substances, Zero Waste and 100% Closed Loop Operations
- Capitalism Clashes
 - There is a decline in savings (as Baby Boomers age)
 - Widening income inequality
 - Intensification of competition from the E.U.
- Work Gains/Losses
 - In 2001, health-care spending had the fastest annual growth in the last 10 years
 - The number of employees covered by an employers health insurance plan fell by 700,000.
 - In 2002, the average hourly pay for production and non-supervisory workers saw its weakest gain in the last seven years.
- Grey Gains/Brown Gains
 - Aging Population is rapidly re-designing America: Lifespan in 2050 is predicted to be 120 to 180 years
 - Number of U.S. White-Collar Jobs possibly moving offshore
- Medical Advances – Brain Cells/Stem Cells
 - Psychotropic drugs, as with Prozac and Ritalin, are making it possible to precisely and individually alter the chemistry of the brain; Intelligence, memory, mood, personality, etc.
 - All tissue in our body comes originally from a single stem cell. And they can be coaxed into becoming any tissue in the body. When there is a problem with the cell, it might be corrected using stem cells. Imagine a world with little disease, sickness or wounds.
- Manufacturing Gains: Nanotechnology
 - Nanomachines could theoretically turn grass clippings into prime sirloin, create a gasoline tree that dispenses gas instead of sap and eradicate common disease, repair body cells and halt aging.
- Information Gains: 24/7; Intelligent Action
 - The Internet is vastly becoming the number one source of information to consumers.

- Software that performs tasks while its human is busy doing other tasks. It could stop bill paying, grocery shopping and create more leisure time.
- Futurizing your organization
 - Recognize your major adversary is not your competition, but your old world mindset
 - Dethrone your lawyers
 - Expect all to participate in the new processes
 - Focus on anticipating and solving people-problems
 - Expect meritocracies to undermine hierarchies

Workshops:

1. Call Center Math: Understanding Common Call Center Statistics and Managing by the Numbers: Provide knowledge and skills for managing a call center “by the numbers.” Top 10 Concepts and Calculations:
 - Service Level
 - i. Definition: percentage of calls handled in “y” seconds or less
 - ii. Most common “speed of service” measure
 - iii. Implications of very high or very low levels
 - iv. Simple average or weighted average
 - Delay Statistics
 - i. Delay of Delayed Calls (actual) verses the Average Delay of all calls (ASA)
 - ii. Don’t have a Service Level and An ASA Goal. As volumes and patterns of calls change, meeting one goal does not guarantee meeting the other.
 - Economics of Scale
 - i. In a skill-based routing environment, agents are logged into multiple skills/queues; take a mix of calls throughout the shift.
 - ii. Economies of scale are better than separate teams for each queue, but not as good as a universal queue
 - iii. It is difficult to calculate the exact results without sophisticated simulation tools
 - Staff Occupancy
 - i. Percentage of time an agent is actually involved in call handling during the hour verses sitting in the idle state waiting for a call.
 - ii. Affected by economies of scale and service goal
 - iii. Calculation: Workload hours divided by staff hours equals agent occupancy
 - Staff Shrinkage
 - i. The percent of paid time an employee is not available to take calls (breaks, meetings, etc.)
 - Blockage and Abandons
 - i. Percentage of customers who hang up while waiting in queue (after ACD answers)
 - ii. Calculation: Number of contacts abandoned / Number of contacts offered
 - Value per Call
 - i. Average amount of revenue or value per single contact
 - ii. Can be measured by agent, team, group or for entire center
 - Cost per Call
 - i. Average cost to handle a single contact
 - ii. By queue or entire center
 - iii. Labor cost issues wages only verses loaded or variable verses fixed
 - Telecom Tradeoffs
 - i. In a revenue-generating call center, you may be able to cost-justify additional staff by proving the positive impact on the company’s bottom line
 - Staff Turnover
 - i. Employees who have left the contact center as a percentage of the total staffing
 - ii. Viewed as an efficiency measure given the high cost associated with losing staff
 - iii. May exceed 100 percent in some cases
 - iv. Can be separated into internal and external turnover

2. **Supportive Supervision: The Motivating Way to Make Workers Stay:** We must act daily on a broader definition of the value that an employee receives from employment. This definition includes the benefits of relationships, working environment, feelings of individual worth and opportunities to achieve personal goals. Most businesses do not have current information about employees' personal goals. This information may be obtained during an additional job interview but attempts to supplement and update this information systematically are unfortunately more rare. Without accurate information of this type, motivating employees is enormously difficult. Credibility is the most important factor in employee support. Our claim that we care about people is going to be tested against evidence of actual conduct that demonstrates caring.
3. **Connecting the Disconnect: Are All Departments Listening to the Voice of the Customer?** View customer opinion and all customer feedback, especially complaints and concerns, as vital market intelligence and your firm's most important competitive advantage. Customer loyalty and retention are driven by far more than just resolving customer issues and inquiries in the service process. Report thoroughly on customer feedback of all types and from all sources then utilize this information to drive process and product enhancement. Identify specific gaps in your information infrastructure and feedback chain. Benchmark your company against others in the industry. Identify ways to remedy the consumer's lack of stake in your business.
4. **Personal Ethics: Navigating the Labyrinth of Triggers and Vulnerabilities:** There is a relationship between emotions and ethical behavioral patterns. Consistent and prolonged negative emotional states lead to unethical behavior. Continued negative emotional states combined with unethical behavior lead to disease, physical and mental illness and soul sickness. Unethical behavior is a symptom of a deeper issue. To get to the root cause of unethical behavior you must ask:
 - What is the unethical behavior?
 - Why do you do it?
 - What don't you like about it?
 - How do you feel when you do it?
 - How do you feel after you do it?
 - What is the real behavior, thought or belief that you want to change?
5. **Internet and Telephone Contacts: How to Positively Impact Consumer Behavior:** The two primary drivers of customer "delight" for telephone initiated contacts are the ability to have a dialog with a customer service representative over the telephone and receiving a fulfillment item of value. Companies can increase the percentage of "delighted" consumers who email consumer affairs by replicating many of the same skills that a representative can convey over the phone. For example, having an email signed by a specific representative, thanking the consumer for taking time to contact the company and encouraging them to contact the company again if they have further questions/concerns. Approximately half of all consumers who receive a fulfillment item of value are "delighted" with their overall interaction. This compares to less than 25 percent who do not. Over 40 percent of consumers who visit the website of a food and beverage company visit their FAQ page. This compares to 30 percent for healthcare and 17 for beauty care. On average, the total expense of offering a consumer fulfillment is less than two percent of the consumer's lifetime purchases.
6. **There's No Such Thing as a Born Leader: The Leading Secrets to Leading Service:** When we believe that successful leaders have excellent qualities and characteristics, it is more useful to understand that these are conclusions we draw from things people do or say. Focusing on this conduct is the best way to identify skills that we can use ourselves. The law of expectancy is when we know what skills we're looking for, we are likely to see them and therefore are more likely to be able to praise them in others and model them ourselves. We tend to talk about negative things more quickly than we praise. Immediacy and specificity in praise help teach exactly what we value so that it is more likely to grow and be repeated.
7. **Now That's Fast: How Kinko's Raised Customer Service Satisfaction by Implementing Real-time Customer Feedback:** Real-time customer feedback systems allow support center managers to know at any time exactly how effective their agents are resolving inbound customer calls in the eyes of the customer they are supporting. Any customer complaints about support call resolution can be immediately escalated and dealt with, potentially turning a negative customer experience into a positive one. Support agents can be measured and incentivized in real-time on key metrics that show how satisfied the customer is with the way their call was handled.

8. **Service Leadership and the Changing Balance of Power in CRM:** Today's customer has less money, works longer hours, has more choice and is a smart shopper. There is a high consumer expectation of ease and convenience throughout the entire purchase. Consumption and post-purchase sales support process. Service leadership in the new era: new model of empowered consumer professional. We can be responsive to consumers needs and expectations by providing service leadership through all your employees and being customer-focused, and integral part of organizational strategy. Consumer professionals need to be the visionaries and the change agent that lead organizational transformation. Service leadership is when customer relationship management should be understood as the means of serving customers throughout the entire process of purchase, consumptions and post-purchase sales support. Six dimensions of CRM from a consumer perspective: shopping support, transaction support, value creation, delivery problem solution and product support. There is a new power struggle in the marketplace in the e-business era, as consumers seek to exercise power through increased access to information and the resources of other consumers, and business seeks to bring the consumer into closer personalized relationships. In business, enterprise systems and e-CRM are developing space, but are coming up against their last frontier, the consumer – the one area of business that is most resistant to systemization. A leadership void has emerged in the technology – first approach to consumer relationship management, and there is a great opportunity for consumer affairs professionals to fill the void.
 9. **Using Six Sigma Tools to Improve Call Center Cost Performance:** Six Sigma is a measure of variability. It is a name given to indicate how much of the data falls within the customers' requirements. The higher the process sigma, the more of the process outputs, products and services, meet customers' requirements – or the fewer the defects. Tools and methodologies targeted at reducing variation and defects, and dramatically improving business results utilizing formal projects that are linked to business goals and priorities. Large-scale integration of fundamental changes throughout the organization – processes, culture and customers – achieves and sustains breakaway (from competitors) results. A fundamental acceptance of Six Sigma practices as normal, day-to-day work practices. The cycle of Six Sigma methodology: define, measure objectives, analyze objectives, improve objectives and control objectives. A control plan is a written summary description of the systems, tools and methods used in minimizing process variation.
 10. **Professionalism In & Out of the Office:** Today's workforce is the most diversified in history. You need to think about what is appropriate. First impressions turn out to be accurate 67 percent of the time. Improve your personal style through hygiene, grooming and dress. Communication is key for working out the problems. Practice the proper etiquette and professional distance. Continue to exude confidence, presence and resources.
 11. **Writing Essentials for Customer Service Staff: How to Ensure Your CS Staff Have the Writing Skills to Support Your Web Self-Service Plan:** Poorly written emails are a problem. They confuse and anger the customer and provide a series of negative outcomes. The traits of excellent customer service email:
 - Use a helpful subject line
 - Respond promptly
 - Personalize the response
 - Answer all the customer's questions
 - Make it possible for the customer to take action
 - Solve the customer's problem.
 - Use a polite, positive and personal tone
 - Write clearly and simply
 - Proofread for mechanical errors
 - Make it easy for the customer to contact you.
- Review sample emails with your staff to see whether the writer has "big picture" strengths.
- Use open-ended scenario-based writing assessments in hiring
 - Provide an authentic customer question and a fact sheet (product knowledge)
 - Use a checklist to rate the email answer

- Use a standard writing assessment developed in-house or purchased.
 - Be work-related, not school-related
 - Assess applied, not abstract, knowledge
 - Assess writing skills, not product knowledge
- Form an email quality review panel to assess staff's writing skills
 - Panel members from all levels/parts of the company: customer service, marketing, communications
 - Set "big picture" and "small picture" quality standards and rating system before review
 - Gather a sample set of emails. Rate writing problems in terms of frequency and severity
- "Big picture" writing skills: thinking skills
 - Find the customer's questions
 - Solve the customer's problem
 - Organize a complete response
 - Integrate "canned" answers into "handmade" answers
- "Small picture" writing skills: basic writing proficiency
 - Spelling and word usage
 - Punctuation
 - Clear, concise sentences
 - Polite, positive and personal tone
 - Write for global customers
- Resources to provide to support email writing training:
 - Self-paced writing improvement tools
 - Coaching
 - Email writing standards and guidelines
 - Models of excellent email responses to customers

12. Best Practices: Creating a Complaint-Friendly Organization: Sharing power with staff during periods of rapid economic growth is easy – sharing power when money is tight is challenging. Getting management on board to reinforce empowerment mistakes as learning opportunities. Effective complaint handling is a critical part of empowerment. Create a receptive managerial attitude to hear feedback passed up the line within an organization. Managers need to see staff complaints as gifts in the same way that staff needs to view customer complaints as gifts. Complaint handling shouldn't be entirely delegated: managers and supervisors need time with complaining customers.

13. Staff Loyalty = Customer Loyalty: The Winning Equation for Higher Profitability

Staff loyalty is a crucial element in any customer loyalty, customer recovery or other CRM program.

Without requisite staff loyalty, the chances of a customer-related program succeeding are not very good.

Avoid the employee lifecycle crisis points:

- New-hire hysteria: Employees are overwhelmed. Solution: pair the new recruit with an experienced associate who can help guide them through the transition
- Promotional peril: Employees are vulnerable when they are ready for a promotion and there is none to give. Solution: Buy some extra time by putting the employee in a special project role
- Boredom blues: Employees with no promotion or special project to look forward to might leave. Solution: Tailor the employee's assignments around their area of interests.

Best practices for building staff loyalty:

- Build a Climate of Trust – That works both ways
- Train, train, train and cross-train
- Make sure each employee has a career path
- Provide frequent evaluations and reviews
- Seek to inform, seek to debrief

- Recognize and reward initiative
- Ask employees what they want
- By all means, have fun
- Hire the right employee in the first place

To build more employee trust and empowerment into your company culture, consider the following:

- Insure staff trust and empowerment are key values in the firm's mission and vision statements
- Practice effective story-telling
- Create company rites that help reinforce the rewards of employee trust and empowerment
- Maintain a free flow of information between management and staff to reinforce the trust factor and help prevent negative communication and gossip

To foster effective communication with staff, consider the following:

- Practice radical inclusion. Letting people hear the news at exactly the same time sends a signal that everyone is valued and no one is excluded from "the know"
- To minimize the rumor mill, practice spontaneous communication.
- The larger the group, the smaller the attention span Keep larger group meetings short
- Be engaging. Make emails, newsletters, intranet sites and bulletin boards fun and interesting to read. Employees love to see their names and pictures in print.
- Be on the lookout for unique and novel ways to communicate with staff.

Three key reasons why you'll want to make staff a part of every customer survey:

- Including staff in customer loyalty research enables staff to have a voice. This tells staff their opinions matter, which in turn helps trust to grow between the company and employees
- Surveying staff as a part of the customer loyalty research process enables management to learn about specific process areas where there is disconnect between what staff perceives and what customers perceive.

14. Dynamic Definition Documents: There are five pillars that support an exceptional quality call monitoring process. The center pillar concerns your call monitoring tools:

- Call Monitoring Form
- Definitions Document
 - i. The form must be unique to your company, customers and cultures
 - ii. Your form should identify both standards and expectations
 - iii. It should reflect as many of the seven recommendations as possible
 - iv. Your form must be accepted by all

The document must contain an introductory section and pages devoted to each criteria:

- What the criteria is
- Why it is important
- Whether it is a standard or expectation and how it is measured
- What the agent should say/do to meet it

Use it to define management's expectations in a quality call. Leave no doubt as to what an agent must do or say to meet the expectations. Use the document to avoid ambiguity and inconsistency. Use this document to hire, motivate, train and retrain. Use your document as a tool for feedback and to achieve learning. Use it to introduce candidates, train your new hires and retrain your veterans. Make it mandatory reference tool in calibration sessions. Lastly, involve your agents in both form and document design.

15. Customer Service in a Multi-Cultural Society:

- Cultural sensitivity is good for your business, morale and bottom line:
 - i. Cultural competence adds insight and opportunities into markets both existing and new
 - ii. Enhance your differentiation and diminish a reliance on price
- Saying "all are welcome" is not enough if your organization does otherwise
 - Training
 - Explore cultural differences with your staff
 - What does your organization outgoing call center IVR message say about you?

- Teach others to wear “cultural lenses” and to use self-reflection
16. Building Better Teams By Increasing Flexibility, Openness and Positive Problem-Solving: Many people view changing their mind as a possible sign of weakness. Team leaders should praise people for listening, openness and flexibility in front of others to show these are valued qualities. This praise must be specific. When people change their mind, praise this specifically Instead of telling them “thanks,” say “thank you for being flexible.” This lets them know that it’s their flexibility you value and not just that you got what you wanted. Change your mind out loud more frequently to show others that you value flexibility. We tend to announce our final analysis without disclosing that we changed our views. It’s better to explain out loud how our thoughts or analysis may have changed as a result of listening.
17. Crisis and Risk Management, Business Continuity and disaster Recovery:
- Crisis and Risk Management: The day-to-day brushfires that can’t be left to chance
 - i. The need for written procedure is critical, and they must be accessible to all associates
 1. Product Recalls, Product Safety and Product Press: Communication should contain all pertinent information.
 2. General liability from a product: Empathy and efficiency are key to meeting the problem up front with you customers.
 3. General liability from incidents and accidents: Customers may have a perception as to “fault” and whose obligation it is to compensate them. Follow up is key to avoid future repeats of similar situations.
 - ii. Re-group after a facility interruption after short-term interruption
 1. Safety, fire drills, evacuation plans, incident reaction templates are very important to maintaining your employees emotional well-being.
 2. Associates expect both human resources department and their supervisor to be involved and concerned about their safety.
 3. Damage control should be your first goal, but offering a service alternative to your customers is important.
 - Business continuity and disaster recovery
 - i. Disaster Recovery: There should be plans in place in case the key facility is shut down
 1. Your employees should know what to do if their facility is damaged.
 2. Your employees should know what to do if they are evacuated during working hours to meet at a designated area
 3. If communications are damaged, employees should learn how to return to the facilities to take up the tasks required to run the operation
 - ii. Disaster Recovery: How to react if your customers have been affected by a disaster
 1. Do you have employees who will need to be released in order to tend to the needs of the community?
 2. If associates are unable to leave the facility, are you prepared for them to remain for an extended period of time?
 3. Is there an office designated to filter requests and determine which to respond to?
 - iii. Business Continuity: Your company and your facility should have a plan in place that will allow you business to continue.

Wednesday, April 30

Technology Forum Keynote Speaker

Terry Jones: eCommerce Means Business: Though the dot com craze is over and 500 internet companies have shut their doors, ecommerce sales are larger than ever. Large and small brands are finding the right techniques to grow their sales on line. Companies understand that searching for products is the second most popular online activity and companies have to determine how their product can be found and purchased. Jones, whose company remained profitable as the dot com bubble burst, discussed the essential ideas that companies must apply to make their business successful in this multi channel world. Over 32 percent of shoppers have now purchased in all three channels (in person, on the

phone, and online) and over 80 percent of college students have made a purchase on the Web, and use it extensively in their studies. Companies who don't insure that their products are available and easy to buy in all three ways won't be successful in this newly wired world.

Workshops:

1. Maximizing Your Existing Technology and Minimizing Your Experience: Most corporations have a strategy typically referred to as a vision or mission. Does this strategy apply to your customers, customer service or contact centers? Step back and assess the technology, tools and applications your company uses. The customer just wants results – what do they think about your service? The disconnection between the website and the retail store is a classic customer service issue. This can be a costly project, but here is how to resolve it at a lower cost. Provide customer interaction at the store level. Provide web support and email support. Use the customer centric theory where you integrate support of shared services, which improves business and customer relations. The improvement is a cross-sell environment: it creates an opportunity to offer additional shared corporate offerings to the customer.

2. Email Management: Thinking Outside the Inbox: Customers demand quicker responses, from two days in 2000 to four hours in 2002. ERMS is an industrial-strength enterprise system for all-purposes to dispatch large volumes of emails. Challenges and Solutions:

- Cost:
 - Challenge: High volumes of email are costly to answer manually, Spam emails are likely and free form messages are difficult to respond.
 - Solution: Cut cost by automation. Structured HTML form workflow, auto acknowledgement and filters Spam and junk email.
 - Solution: Cut cost by agent productivity. All employees should have the knowledge base access and all information in front of them. They should also have templates for message composition.
- Service:
 - Challenge: Inconsistent response quality among agents, agents cannot find the answer and a fast response is expected.
 - Solution: Develop a sophisticated rules-based routing engine. Allow agent access to knowledge that they need.
- Operations:
 - Challenge: Messages routed to wrong agent due to limited integration, customer data may be missing, or there is no support for geographically distributed multi-site environments.
 - Solution: Integration with customer records and with other contact channels, as well as the knowledge base and multiple contact centers.

Future trends: there will be a continued rising of emails and 50 percent of email boxes will be used to web access by 2005.

3. Gaining Efficiencies from Technology without hurting Customer Relationships: The value of customer loyalty/retention is generally greater than operational efficiency, which can enhance a customer relationship. You need to know customers to employ technology properly. Establish who your customers are and determine the value of them. Learn their preferences and understand why defectors leave. Structure your contact center to enhance customer relationships. Technology affects customer relationships in three areas:

- The relationship between corporate objectives and technology utilization
 - Focusing on wrong metrics, allowing technology to replace good agents and limiting communication channels.
- Efficiency improvements that can also improve effectiveness
 - Talk time, CRM, CTI, email response, automated monitoring and workforce management.
- Addressing the technology areas that irritate customers.
 - Put yourself in the customer's shoes. Learn customer channel preference, make the website easy to use listen to you IVR and track results.

Address the technology areas that irate customers by scripting, training and reporting. Put together a plan to identify target customers and their preference. Identify channels and anticipated traffic. Develop ROI for strategic initiatives and continually update.

4. Calibrate Your Coaches and Monitor for Better Performance: Develop a meeting for coaches to review a series of calls together and compare their observations. Use a “calibration-scoring format” and the group listens to a taped call and “scores” the call without discussion. After the calls, the group discusses the scoring. The goal is to arrive at a consensus that brings about more consistency and to develop this document for your company. This is a quick reference guide for coaches and front liners to use when inconsistencies arise about a standard and it contains answers to what constitutes as having met the standard and what constitutes as not having met the standard.

Break each standard into “logical parts” and list each part on the form. You need to create standards, train staff and train the coaches to implement these standards.

5.CSI: Customer Satisfaction Investigation: It is quick to jump to conclusions when there is a problem without looking at all the data. When benchmarking, organizations cannot agree on questions, definitions and methods. There could be false data from employees and stale data from old results. Different technologies yield different results. Mail and the web tend to err on the negative, while the phone tends to err on the positive. There can be a number of interpretations. You need to dig deeper for results and see the big picture rather than what is immediately wrong. Don't confuse correlation with causation. Results based on a sample imply the margin of error. Remember that numerical differences are not the same as statistical differences.

6. Developing a True Partnership with the Call Center Outsource: Spend time building a relationship by agreeing on common principals, negotiate the difference and act for the future. Treat employees as customers by coaching for improvement, reward for successes, provide excellent training and create a fun environment. Identify area of opportunity in technology, set goals to address those opportunities and allocate resources to implement. Proactively look for trends before they become issues, anticipate consumer and internal customers' needs and take action. Negotiate the differences by acting with honor and trust, be willing to compromise, being open-minded to ideas and contributions from all sources and keep promises and fulfill commitments.

7. Navigating the Seas of Change: Change is increased customer expectations, rapidly evolving technology and regulatory challenges. Four typical responses to change are: the Victim, the Critic, the Bystander and the Navigator. Four key actions to manage your change are: acknowledge your own reaction, assess the impact of change, seek and acknowledge others' reactions and take positive action. Always acknowledge the emotion, communicate the logic and implement the change.

8. “The Surveillance Society in Reverse: How Consumer Technology Tips the Scales to Consumers”:
Keep track of quickly emergency technology – learn to audit the external pulse. React intelligently to consumer feedback that's funneled to you via new technology. Use technology to your advantage to collect information and respond.

9.Server Consolidation: Benefits of server consolidation are: real estate, initial costs and ongoing costs. Roadblocks to implementation are vendor reluctance and internal reluctance. Mainframe inspired technology and use many servers on one piece of hardware. Server consolidation will save you money. A consolidation project can be used as a catalyst for disaster recovery planning. Implementing this technology will keep your company fluid and dynamic and allow you to outdo your competition.

10. When reports are Not Enough: Optimizing Contact Center Performance: Reporting is generally simple questions with rigid, structured answers that one size fits all. Analysis is complex questions with fluid and interactive answers that provides to for a decision to be made. Strategic issues that need to be managed are: demand optimization, process optimization, resource optimization and balanced scorecards. Reduce manual reporting and optimize contact center and agent effectiveness, Give timely and relevant information and provide performance and effectiveness benchmarking. Empower agents

with daily individual performance measurements. Compare importance of problem points and how well you handle them. Match requirements to importance of solving the issues. Rank vendors by how well they meet requirements and determine where are the gaps and prioritize.

10. Put the Customer Back in Your CRM Solution: Leveraging Online Surveys to Strengthen Customer Relationships: The affordable, quick and high response method to understand your customers is an online survey. You need to identify your objective, decide what information you need, develop a questionnaire, conduct the survey, analyze the responses and recommend action. Don't ask more than 20 questions, don't include too many open-ended questions and don't try to conduct survey design by committee. Make it easy for your respondents to answer, share your actions as a result of the survey with your customers and conduct small, frequent surveys.

11. Multi-Channel Contact Centers: Phone, Email, Web: Can't They Get Along? The three Cs of Multi-Channel are: Customer Service, Cost Reduction and Cash (Revenue). Using multi-channels is the key. Use UWQ for top service to priority customers and service contract automation for cost reduction. Use your customer intelligence to produce more revenue.

12. Using Technology to Strengthen the Customer Relationship: A comprehensive CRM program will keep you in touch with your customers. New technology solutions are available to assist you in your inbound and outbound customer contact marketing strategies. Advanced contact technologies – including multi-media options, sophisticated databases and IVR and self-service tools – enable companies to contact their unique customer base at the right time.