



SOCAP BOARD CHAIRS PANEL "60 IDEAS IN 60 MINUTES"

Board Chair Panel Contributors

Jon Cox, 2022

Lisa Diehl, 2019-2021

Jim Moloney, 2018

Helen Horsham-Bertels, 2017

Marie Shubin, 2015

Moderator: Tom Rocca, SOCAP Southeast Community President

Kim McMiller, 2014

Susan Baranowsky Naylor, 2010

Tom Asher, 2007

Sheila Sullivan, 2005

Beth Ziff, 2002

Recommended reading from the panelists – our favorites!

1. Throwing the Elephant (The Art of Managing Up) by Stanley Bing
2. Multipliers, How the Best Leaders Make Everyone Smart, by Liz Wiseman
3. The Boy, the Mole, the Fox, and the Horse, by Charlie Mackesy
4. Who Moved My Cheese by Dr Spencer Johnson (dealing with change in the workplace)
5. Good to Great by Jim Collins
6. Strategic Customer Service by John Goodman
7. Start With Why by Simon Sinek
8. 7 Habits of Highly Effective People by Steven Covey

QUESTION: All too often the consumer services team is off the corporate radar, not included and engaged. So, let's begin today with what are your tips for Optimizing Voice of the Customers in your organization?

- 1 Make sure that you are driving **actionable insights** back into your organization when you have the opportunity to talk with others
Bring consumers to the meetings and presentations by sharing verbatims/call recordings/social posts with marketing, quality, legal, c-suite). Post-consumer comments where others in your company can see them.
- 2 Tell the story via customer's journey.
Consciously focus your staff on the things you want to share peripherally (not defaulting back to the latest complaint or the lunatic oddball incident. Train your team on story telling. Help your staff write an elevator speech.
- 4 Make sure everyone on your team knows your scores: CSAT, CES, NPS - and what they mean.
- 5



- 6 Share detailed data - you are the voice of the customer - relate the data to a specific audience.
- 7 Use Infographics that can whet appetites and leave an audience wanting more!
Make sure your reports are consistent and accurate so that others can rely on this information
- 8 to be accurate.
- 9 Don't just share the bad news - share the news that reinforces success and provides ideas. Stop reporting Complaints, Inquiries and Praise reverse the order report Praise first.

QUESTION: Consumer Professionals see so much and can bring a lot to the table. Let's hear a few tips on how to be seen as a thought leader in your company.

- 10 Simply by achieving greater visibility for your organization- that will lead to thought leadership
- 11 Lead with examples...share consumer experiences that are related to strategies and initiatives
- 12 Ask the "why" questions - Why are we doing XXX or Why aren't we doing XXX
Its more than talking to the C-Suite. Be aware of the power players and influencers outside of the C-Suite and make an effort to work and collaborate with them. Be proactive and invite them
- 13 to collaborate with you.
- 14 Build symbiotic relationships with marketing/legal/quality.

Develop your presentation skills so that other want to listen to you and participate. You can improve through classes in presentation skills, using a coach or organizations like Toastmasters.
- 15 Realize that socializing with other employees builds relationships that can have influence, so
- 16 participate when you can in events outside of work.

QUESTION: Understanding and leveraging your corporate culture is a big factor in the success of your consumer care team and its role in the company. What do you recommend?

- 17 Cascade the company mission, vision, goals and objectives to front line - everyone should be able to relate their work to the mission. Talk to your team in terms of how their results impact the whole - Connect agents to outcomes
- 18 With your team develop your own CC department mission statement so everyone owns it
- 19 Ensure the CC team leads by example E.g., culture of inclusion - do you actively include differently abled reps on your team?
Create a culture of sustainability - how does the contact center recycle, upcycle, repurpose, reuse etc.
- 20



QUESTION: Managing effectively is upward as well as downward. What are a few tips for managing up the chain of command in your organization?

- 21 Prepare your leaders for meeting with them. Provide them advance reads;
Plan for meetings with leaders by starting with their highest priorities; take time to anticipate their questions and be ready with answers or have data at your fingertips.
- 22 Speak the “language” of your boss and your leaders (use financial terms, marketing terms, quality terms, etc.). Relate customer issues to their areas of expertise, what it will cost, how it will expand market etc.
- 23 When in discussions with your boss, identify issues AND provide multiple solutions
Don’t be the boy who cries wolf. Establish a consistent process for sharing perspective when you update others on Watchouts, Worries & Warts as well as the Wins
- 24
- 25

QUESTION: We can't forget how finances drive decisions so let's switch topics now and talk about Budget - How to get it? How to justify it?

- 26 Understand that the Contact center is a revenue generator/loyalty builder (know cost of customer acquisition and the value of loyalty)
Know your financial numbers - What it costs your company to serve;
Know your cost per contact by channel; Average Order value; Contribution to Margin; Average speed of answer ASA; Turn-around time (TAT); Average handle time (AHT); Daily billable; Service cost per product or other standard metrics used by your company/ When talking about these metrics talk in terms of money.
- 27 Make sure that you are training your team on the costs and value of what they do. Share the department budget and revenue with the team and help them reduce costly waste and improve efficiency.
- 28 Most contact centers in manufacturing companies are included as an overhead expense. Make sure that total cost per contact is a performance metric for center and trend it over time so you can show improvement as your team becomes more efficient, adds technology, changes processes etc.
- 29 Time is money and memory is short. Report savings of time in terms of money-much more impact to others than reporting in seconds or minutes. Be seen as effective by reporting the short-term ROI/Paybacks of your projects to senior leaders BUT also continue to report the long-term savings too. This is especially effective when adding technology that adds permanent efficiency gains.
- 30



QUESTION: We hear too often how consumer care is left out of new product development. What have some of you done to get a seat at the product innovation or marketing tables?

- 31 Build relationships with the product innovation teams. Don't wait for formal reporting cycles. Be proactive and send relevant information their way about consumer feedback that feeds their projects.
- 32 Talk to people at the manufacturing plants. Spend time with the line; Organize regular on-site time with other departments - cross functional team meetings to learn about the work (IE, Gallo Glass day for CIC team)
- 33 Understand what is important to the internal customer; Learn about the issues in the production that create consumer feedback.
- 34 Conduct an annual review of reason codes with plants and quality and marketing to make sure you capture changes to products and packaging
- 35 Get on the agenda for new employee training - everyone should know that your department exists and is the feedback repository for the company
- 36 Conduct an annual report/dashboard review with a focus group from your distribution list & tweak your reports to keep them relevant and updated. IE drop of the old products and focus on the new marketing campaigns
- 37 For new Marketing and Quality employees provide them with copies of historic reports to lay a foundation for them
- 38 Conduct an FAQ review when marketing staff changes occur - change in product strategy often creates change in responses and when product changes occur
- 39 Conduct User Tools training for your users on the dashboards, the report calculations, the staff roles and needs. While we must know what our internal clients need, they need to know what your contact center needs to do its job.

QUESTION: What have you done to amplify diversity & inclusion in your workplace?

- 40 Make an effort to be the "UN" of the company with your CX Team; actively seek people and projects that demonstrate this.
- 41 Leverage the ADA (differently abled) community. Check into your local community for resources that serve the differently abled community as a recruiting tool for future employees
- 42 Make yourself knowledgeable and leverage your employers' resources to support ADA employees who are in your workplace
- 43 Be self-aware of your leadership style and how you act with specific staff members
- 44 Recognize your role is as a servant leader and look for ways to optimize individuals not just the group
- 45



QUESTION: Leveraging your people resources - how do you think about and use all the resources you have?

- 46 Hire the right fit for the principal activity of the job; Streamline and simplify requirements
Consciously leverage your internal talent E.g., trainers, innovative thinkers, IT liaisons, writers,
- 47 etc.
- 48 Delegate - do what only you can do
- 49 Be a teacher
- 50 Allow others to fail "safely"
Look for hidden talent within your team. Keep a working list unique skills the people on your
- 51 team have, related and unrelated to work that could be applied to projects
Set people up for success: With new employees share roadmaps & calendars for technology;
- 52 services; products etc. Review every year with your team.
- 53 Train staff on virtual meeting best practices; establish a virtual meeting protocol
In the virtual workplace, communicate more frequently and more inclusively; live walking
- 54 around video calls, news from the office etc.
Document and reinforce achievement - Individual WIN Files, internal department displays,
- 55 badges, announcements on the company newsletter or daily scroll; celebratory banners at the
office entrance
- 56 Develop a growth and planning strategy for each of your staff members and plan your budget
to support all your training and development plans.

QUESTION: To effectively manage change, you have to think about how you are going to manage changes. What ideas can you share on this topic?

- 57 Activate a method to recognize customer behavior change; trend reports; word choice; etc.
Recognize employees have changed and adjust things like KPI's, shift length or monitoring
- 58 frequency for the new virtual workplace
Take time for a little self-analysis. With all these changes in the world today, you may have to
- 56 adjust your behavior, expectations and leadership style.

QUESTION: We could not discuss employees and our careers without talking about Mentoring. What are your thoughts?

- 58 Be a mentor! You will learn from your mentee as well as teach them.
- 59 Get a mentor up a level or 2 or 3 from yourself
- 60 Be selective and proactive and pick a mentor whose work/behavior/success you admire
- 61 Do peer mentoring - Build your circle of trusted colleagues who can advise you.



QUESTION: Many of us came into our consumer care careers accidentally and found a home; a career we loved. What are your thoughts on managing our careers in this industry?

- 62 Define your career end game. What are you striving for? What does success look like?
Make a career game plan. Do you know and understand the necessary education and skills for a successful career as a CX leader; Do you have a written plan for yourself? Do you have a funding
- 63 plan for education if you need it?
Leverage SOCAP's members benefits to help your career. Reach out to peers and share best
- 64 practices; be generous you will get so much in return
Acknowledge and celebrate your career success as dramatically as project successes are
- 65 celebrated.

QUESTION: And finally, after all is said and done how have you achieved a satisfactory work life balance?

- 66 CELEBRATING the small wins - Answering this question: Today was a good day because I "XXX"
- 67 Being aware of the need and value of balance and separating work from other areas
- 68 Making a to do list for tomorrow so I can go home without worrying all night
- 69 Building a good team so I can take time away confidently
Creating a ritual or transition activity that ends the workday and starts your home life; Even if you are working from home at the dining room table, Turn off the phone, the computer, get up from your chair, turn out the lights. Take a deep breath and consciously transition to the next
- 70 phase.