

Open Atmosphere Fosters Strong Communication at BECU

by Susan Hash

Building rapport at all levels breaks down common interdepartmental barriers.

If your call center agents have ever been caught off guard by a marketing promotion, you're not alone. Inadequate coordination between the marketing department and the call center is a pet peeve voiced by many managers.

Wouldn't it be great to have an interdepartmental relationship based on mutual respect and open communication? It's not an unobtainable goal. In fact, at Boeing Employees' Credit Union (BECU), the marketing group is the contact center's biggest fan, says Marc Healy, director of member services.

"[Marketing] knows that whenever a mailing goes out, our queue fills up. They have an appreciation for that. We have a fantastic relationship that starts with trust — we don't fingerpoint; we know we're a team. We're two different organizations within the company, but we're focused on one goal. We strive toward that goal and try to break down the management of silo worlds."

But it wasn't always like that. "We used to be like many other call centers," says Pam Treischel, contact center operations manager. "We'd have to ask members to read to us what they had just received in the mail because we hadn't seen it." Healy and Treischel began the process of educating the marketing group on the contact center's operations to lay the foundation for a stronger relationship between the departments.

Creating a Desire to Learn

As a first step toward cultivating a stronger relationship with the marketing group, Treischel set up regular monthly meetings to review any mailings scheduled to go out. Prior to the meetings, marketing provides Treischel

with a PDF file for review and input.

"We're part of a team. They don't just send the mailings to us a week before it goes out," says Healy. "We have the ability to modify content and make changes based on what we know may impact us in a negative manner."

The monthly meetings helped to create an awareness of the impact that the timing of mailings can have on the contact center. The marketing group has access to monthly call volume and service level statistics so they can be aware of monthly cycles.

Although the educational process

began with a few meetings, both departments quickly realized that they could be strong allies. "Then there was a desire to learn more," Treischel says.

In fact, the marketing group has become highly proactive toward keeping abreast of the contact center's operations. Members of the department regularly visit the center to plug in on calls.

Initially, though, it required a little arm-twisting, Treischel says. She found that, often, veteran marketing staff had preconceptions of what the call center was like. "What we did five years ago is totally different from what we do today,"

Fun Activities Heighten Camaraderie

"You've got to have fun at work and enjoy the environment you're in," says BECU Contact Center Operations Manager Pam Treischel. "If you make the workplace fun, make people want to come to work and put a smile on their faces, then they continue smiling over the phone with our members."

To keep the atmosphere entertaining, the contact center organizes many themed festivities. "We try to celebrate the crazy stuff," Treischel says. For instance, in the past, one of the agents' tasks involved manually filling in account information on a blue form when making a credit card payment for a member. "When we automated that process, we celebrated the demise of the Blue Slip," she says. On that particular day, the offices were decorated in blue, staff members dressed up as Smurfs and Treischel wore a Cookie Monster costume.

Team competitions are popular, too. A holiday favorite is the Gingerbread House Contest.

Each team builds a gingerbread house inbetween calls. "It's unbelievable how elaborate they get," she says. It also promotes cross-team camaraderie. "They all want to see what the other teams are doing and meet with these other people who are so creative."



BECU contact center teams create elaborate gingerbread houses in between calls for an annual holiday contest.



she says. “It took some coaxing and encouraging — I would go sit in their area, too, if that’s what was necessary.” Generally, one time was enough to dispel outdated impressions.

“Once they sit in, they truly appreciate what we do,” says Treischel. “In fact, our marketing director recently visited — knowing how heavily we were getting hit at the time — and really just wanted to experience what we were experiencing. It’s nice to see.”

Open Communication Is a Top-Down Process

The companywide attention on the contact center starts at the top of the organization and filters down to the front line. “There is a true understanding and expectation at the management and director level that the contact center is the voice of the credit union,” says Healy. “It’s a key contributor to the success of our company. We’re all focused on it.”

In addition to relationship-building at the management and director level, each contact center supervisor is assigned a department liaison role, says Treischel. “They develop a rapport with their peers in the departments to which they’re assigned.” They stay informed by attending their liaison department’s meetings and networking with others in those areas.

The arrangement has had significant benefits, says Treischel. “As issues or questions arise, each area knows who to contact and is comfortable doing so. This has been a huge help, especially with my supervisory team growing larg-

er and larger — other departments know who they can contact. There’s no guessing or miscommunication. And we gain a resident expert in the contact center who can identify process improvement opportunities more easily.”

On the front lines, a strong team atmosphere supports open communications, as well. The contact center is staffed by approximately 140 agents grouped into teams with a 17-to-1 supervisor-to-agent ratio. “Breaking down a large department into teams helps facilitate communication,” says Treischel. “When you’re part of a team, you’re less likely to feel as though you’re getting left out of the loop.”

Agents are drawn further into the feedback exchange at team meetings. “We invite other areas to present at our team meetings so that they can explain their side of the process to give us an understanding of the full circle,” Treischel says.

In addition to teamwork within the center, BECU holds quarterly “business reviews” that are attended by representatives from every job function, says Healy. “They participate in coming up with ideas for improvement opportunities from the basics to very large initiatives, so they feel like they have a say.”

Highly Accessible Management

Establishing an open-door policy is easy enough to do — living it can be much more challenging.

At BECU, it begins with a non-threatening environment, says Healy. “Agents know they can provide suggestions, ideas and opinions without feeling

like they’re going to be reprimanded in any way.”

Healy credits much of the contact center’s open atmosphere to Treischel’s efforts. “She has set up an environment in which her people trust her to look out for their best interests,” he says. “And she makes herself very available to her staff.”

Treischel establishes a high level of comfort with agents with an open exchange of information. Healy says, “[Treischel] is a huge advocate for her group. She keeps them plugged in by continually keeping everyone apprised and knowledgeable about what’s going on” elsewhere in the organization.

Much of it comes down to respect. Treischel works hard with every agent to ensure a sense of flexibility in scheduling. She has also developed career paths to offer growth opportunities that encourage agents to stay in the center. And daily, “she does whatever she can to minimize incoming calls into their world,” says Healy.

Treischel also tries to stay connected by sitting in on all of the team meetings — a daunting task with 10 teams, but one she feels is necessary in developing a comfort level with agents.

So how comfortable are BECU agents with management? Turnover had been hovering around 60 percent. For the past two years, it has dropped to 20 percent. Treischel attributes that to the increased career development opportunities. But as Healy points out, “Eighty percent of the people who leave their jobs say it’s because of their bosses. Money is a great motivator, but people won’t stick around just for the money.” CCMRReview