

Monitoring and Coaching Practices Show Room for Improvement, Study Says

To remedy ailing environments, experts recommend a strong cultural foundation and a positive managerial approach.

Monitoring, and its indispensable mate, coaching, are being shortchanged and neglected within many call centers, according to recent industry research. The *2007 Call Monitoring Practices Survey*, sponsored by Verint Systems Inc. and Aon Consulting, reveals that 75 percent of the 438 U.S. companies that responded to the survey cite a paucity of time and resources as their greatest monitoring challenge (see Figure 1). As a result, many professionals reported experiencing either the nonexistence of quality monitoring and coaching, or the presence of enervating practices. The encouraging news is that call center leaders and experts are passionate and resolute about improving monitoring and coaching methods within struggling centers and, herein, they share useful philosophies and strategies.

Figure 1. Top Monitoring Challenges Facing Companies

Percent of Companies Reporting as one of Top Four Challenges



Numbers will exceed 100% because survey participants were able to choose multiple responses. Source: 2007 Call Monitoring Practices Survey Results sponsored by Aon Consulting and Verint Systems, Inc.

CONNECTING CULTURAL CLARITY TO QUALITY

In some call centers, a “big brother” mindset prevails in which frontline staff view monitoring as eavesdropping rather than a positive performance improvement practice.



Kristyn Emenecker,
Solutions Marketing
Manager, Witness
Actionable Solutions, Verint
Systems

These centers suffer from a lack of trust, says Kristyn Emenecker, solutions marketing manager, Witness Actionable Solutions, Verint Systems. “Unfortunately, when that has been part of the environment for a while, it’s very difficult to turn it around. You can’t just implement a quality program by creating a QA form and having weekly one-on-ones. It doesn’t work like that. It’s not a magic pill.”

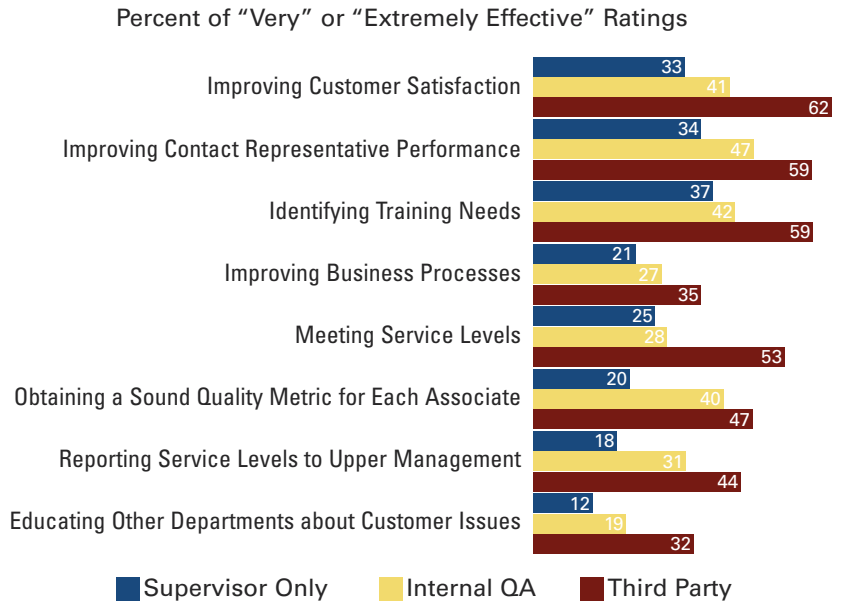
Emenecker emphasizes the importance of first establishing a culture for quality service within the organization. “You can’t drive quality from the QA form,” she says. “You have to drive quality from your culture — the QA form and coaching are an extension of that and a way to personalize development for each employee.”

POSITIVITY BREEDS POSITIVITY

Constructive feedback fosters agent development, but many centers still appear perplexed about coaching and its potential impact. The survey reflects that 58 percent of respondents view the ability to coach effectively as a leading challenge. Many experts argue that this perceived challenge can be overcome by implementing simple, yet meaningful coaching methods.

Mary Cruse believes that positive reinforcement is integral to successful coaching. Cruse is director of Client Services-West for Genzyme Genetics, a division of Genzyme Corp., and president of the Los Angeles chapter of Help

Figure 2. Effectiveness of Monitoring by Monitoring Source



Source: 2007 Call Monitoring Practices Survey Results sponsored by Aon Consulting and Verint Systems, Inc.

Desk Institute. When coaching agents, she suggests focusing on what they’ve done well, as well as opportunities for improvement. “It’s not about what they did wrong. It’s about what they can do better,” she says.

Cruse recommends that supervisors share any compliments an agent receives with the agent, as well as with upper management. This creates “layers of visibility,” she says, as well as layers of positivity.

► Monitoring and Coaching: A Look at Current Trends and Best Practices

A Q&A WITH REBECCA GIBSON, DIRECTOR OF LEARNING AND PERFORMANCE, MAGELLAN HEALTH SERVICES



Rebecca Gibson,
Director of Learning and
Performance, Magellan
Health Services

“Observing, or monitoring, the most important facets of interactions and transactions — whether real-time or recorded — is the only way to measure quality and accuracy,” says Rebecca Gibson, director of learning and performance, Magellan Health Services.

“But just measuring isn’t enough — the measurement gives us a snapshot in time. It’s through feedback and coaching that a company will realize the continuous improvement they need to stay competitive and to motivate their workforce.”

Gibson’s vast call center career includes extensive work as a trainer, coach, supervisor and consultant. We recently asked her to assess the progress of monitoring and coaching and to consider its future develop-

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COACHING THROUGH QUESTIONING

A positive approach to coaching also requires mentors to use proper verbiage when communicating with agents. For instance, the words “you should have” are not advised when coaching agents, says Clifford Hurst, president of Career Impact and author of *Your Pivotal Role: Frontline Leadership in the Call Center* (published by ICMi Press).

Hurst recommends that call center supervisors adopt a Socratic question-and-answer approach when coaching. Instead of telling agents how to change their behavior, try to draw out of them their own analysis and ideas about how to improve, he says.

Hurst has identified three questions that supervisors can use when coaching to help agents find their own solutions. He calls them the “Three Magic Questions”:

1. How do you *feel* that call went?
2. What did you do particularly *well* on that call?
3. What *can* you do differently next time?

“There is no defensiveness built up by this kind of coaching,” Hurst says. “And even in the 20 percent of the time that the agent misidentifies the areas most in need of improvement, by the time you’ve gone through these three questions, the agent is much more open to feedback than he would have been before.”

The coaching system espoused at 1-800-flowers.com is a melding of positive reinforcement and purposeful questioning.

“We believe in demonstrating a positive approach during our coaching sessions,” explains Peter Schiller, director of quality assurance and performance manage-

► **CMi:** How would you describe your monitoring and coaching background? What does your role as director of learning and performance at Magellan Health Services entail?

GIBSON: As the director of Learning and Performance, I work with the training team who supports the goals of our service centers. This includes the development of the training staff in the service centers, leadership and supervisory development, compliance programs, such as security and privacy training, and ownership of our learning management system and online learning resources. As a call center supervisor, I was responsible for participating in and supporting quality monitoring initiatives for clients in a variety of industries. As a trainer, I designed training programs that were aligned with quality monitoring programs and designed classroom classes and tools to support supervisors’ coaching efforts. As a consultant, I showed clients how quality monitoring and coaching programs can be aligned with business priorities and objectives and implemented programs in many different types of companies. Finally, at Magellan, I’ve had the opportunity to work on the project team tasked with redesigning and relaunching the quality monitoring program for our 24 service centers.

CMi: What are some of the monitoring and coaching best practices that are currently being implemented in call centers?

GIBSON: The biggest change I see is a realization that supervisors need training and coaching themselves to learn how to provide effective and motivating feedback to their employees. Just having the monitoring data available isn’t enough — coaching that is realistic, accurate, mature and intentional is essential to improve agent performance and job satisfaction. In the past, it was often assumed that, armed with the data, supervisors would automatically know how to deliver feedback that was motivational and appropriate. Across the board, though, agents hated monitoring because the feedback they received was anything but that. I think that call centers have come to realize that feedback and coaching should be geared not toward pointing out the things agents do that are wrong, but toward helping agents realize their potential, involving them in the process of identifying areas for improvement (both systemic and individual) and underscore the importance of the work they do.

CMi: What are test-driven, proven strategies for developing an effective monitoring and coaching program?

GIBSON: The most important components are, first, identifying criteria that are “real” — that contribute in a meaningful way to the quality of the interaction — and making sure everyone across all levels of the call center understand the criteria, can articulate the performance standards and know what it means to demonstrate them. By spending time at the outset to educate everyone, you’re more likely to find employees self-monitoring and assisting each other in meeting the criteria.

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ment for 1-800-flowers.com. Managers' coaching techniques support the company tenet that "attitude is everything."

"Through our 'self-realization' techniques, agents are not told what to do, but rather asked," Schiller says. "For agents who are resistant to the process, we identify what, specifically, they are resisting by asking 'how' and 'why.' Oftentimes, it's not the monitoring and coaching that meets resistance, but rather the lack of confidence to achieve the desired result. By providing agents with the tools they need to be successful, instilling pride in their job, and showing them their ability to make a difference — the negative attitudes fall away."

SELF-REFLECTION = SYSTEMATIC CHANGE

For those call centers that are striving to improve their service quality, Hurst offers this advice: "Look in the mirror first. We often fault agents for issues that have been created by management, whether that's confusing pricing or return policies, or databases that aren't easy to navigate onscreen. Look for ways to improve the system first."

That's advice that New Hampshire-based CalLogix has put into practice. CalLogix, formerly Abacus Communications, is an outsourcing firm with sites in Manchester and Bedford. In 2002, after reflecting on its culture, the company brought in call center industry veteran Sherry Leonard to reform it. Leonard, in conjunction with the quality assurance team, began by entirely revamping the monitoring program.

Prior to her arrival, monitoring consisted largely of "quality being delivered to representatives on a form," she says. "In the past, if you

▶ Next, I believe involving employees across all levels of the organization is important. Agents should have the opportunity to hear their calls and others and to participate in calibration sessions. High-level managers should monitor with their supervisors and agents and share their expectations. The more you're able to make ongoing and frequent discussions about the nature of interactions a part of the fabric of daily call center life, that's when your program is integrated into your operations. That's when you're going to see the biggest benefits — everyone is participating, everyone has a voice and everyone is buying in. Everything else — how often you're coaching, how many calls you listen to a month, what technology you use — is just details. Making your program matter, making it important, giving it heart and relevance — that's what's going to make your program effective.

ICMI: What are the main concerns and priorities among call center managers when monitoring an agent's communication with a customer?

GIBSON: I like to believe we're getting smart about measuring what matters. Does it really matter if the rep uses the caller's name? Are we willing to really listen and agree that call should have been twice our desired call length? I hope we've gotten to the point where we aren't concerned only with the check boxes on our monitoring form and achieving a certain score — but that we're able to hear a call and determine if the rep did his or her best or if, in spite of all the call criteria not being met, the caller was satisfied. In the past, the checklist approach was much more common, but I think many forward-thinking call center managers are able to see a more nuanced definition of call quality, while still adhering to the quality standards.

ICMI: What do you think is the overall attitude of agents toward having their calls recorded and monitored?

GIBSON: I think we've gotten to the point where, in many job markets, agents know we need them more than they need us. This can lead to a situation where the quality program lacks teeth. Supervisors feel they can't be "honest" with agents because they know the agents know there aren't real consequences for not improving their performance. Companies who have transcended this situation have gone beyond punitive programs that rely on "dings" for doing things wrong and negative reinforcement. The only way to create positive attitudes toward monitoring programs is to create a program that is actually beneficial and positive to agents. When a program is set up that is based on positive principles, such as a shared commitment toward customers and quality improvement, that's when you see agents with more positive attitudes toward these programs.

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failed two evaluations, you were fired.” Besides increasing agent attrition, the practice produced an atmosphere of fear — many agents would quit their jobs before they received their second or third evaluations.

“We had a fear of supervisors and management, and that, to me, is just heartbreaking — that people are working in fear,” says Leonard.

Under her guidance, an impersonal and punitive approach was replaced with an affirmative culture that now includes action development plans, internal calibrations, self-monitoring and evaluation, peer-mentoring programs, specialty and refresher agent training, motivational programs, Zenger-Miller training for supervisors, reward programs, and monitoring conducted by both the quality assurance team and supervisors.

The Aon/Verint study deems third-party monitoring as the most effective technique; however, monitoring conducted by both a quality assurance team and call center supervisors is considered superior to monitoring from a single source (see Figure 2 on page 2). The report states that “many organizations find it useful to use a combination of monitoring sources, in order to gain a ‘snapshot’ of calls from different perspectives.”

Leonard’s philosophy mirrors this belief. “When you’re out on the floor every day, as supervisors are, you understand why things are handled the way they are sometimes. QA is not visible at all times on the floor, and they’re not with your frontline out there on the floor — they don’t always realize something has changed within a program or [why] we do something different during a specific time of day. [Using a combined approach] gives you a nice balance of feedback from

► **CMI:** What advice would you give to managers and coaches for defusing an agent’s negative attitude toward monitoring and coaching?

GIBSON: Managers and coaches have to design programs that are positive and affirming, that reward desired behaviors and, most importantly, are based on performance criteria that are meaningful, clear and attainable. With many companies I’ve worked with, I’ve found programs and criteria that are so poorly defined and unclear that even supervisors can’t agree on the criteria! Management teams have to be 100 percent certain that their program is 100 percent solid — meaningful, clear, understandable to all levels of the call center. If agents have a negative perception of the monitoring and coaching program, it is the management team’s responsibility to listen to agents’ opinions and perspectives and address them. There is plenty of room within any strong monitoring and coaching program to incorporate everyone’s perspectives — I think most call centers would find that when it comes down to it, agents, managers, supervisors and coaches are all interested in acting in the best interest of the organization and its customers.

CMI: What should a call center supervisor’s objectives be when coaching agents?

GIBSON: There are really two goals. First, to close performance gaps and increase performance. It’s important that agents who aren’t meeting the required performance criteria are provided with honest, accurate feedback, provided with the necessary instruction and modeling, and given the opportunity to practice and improve. Second, to solidify and confirm positive behaviors. When agents are doing the things they are supposed to be doing, it’s important to recognize that and highlight the importance of those behaviors. There are also a number of ancillary goals — increasing communication, aligning performance expectations, learning more about the motivation and perspectives of individual agents — that are worthwhile as well. Coaching is the No. 1 way the call center management team should be communicating with and connecting with the workforce. What could be more important than discussions about performance and whether we are meeting our goals?

CMI: What is the current status of self-monitoring or self-coaching? How prevalent is that and how effective?

GIBSON: I think many call centers haven’t implemented opportunities for agents to monitor their own performance because of the time involved. Most call centers aren’t willing to decrease the number of interactions monitored or coaching sessions conducted by supervisors — and it takes additional time to allow an agent to monitor his or her calls and record the feedback. I think it can be a useful strategy when specific parameters and objectives are put in place. When incorporating self-monitoring into a monitoring pro-

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a QA team member, who will probably look at things as very black-and-white, as well as a supervisor, who is going to look at the gray areas. The representatives feel that [evaluations] are much more fair coming from both groups.”

In the present-day CaLLogix, the company continually looks for ways to improve its own system, instead of faulting agents. “We’ve changed that whole [former monitoring outlook]. It’s not to catch them doing something wrong. It’s to catch them doing something well and to identify where we need to make improvements,” says Leonard, who is now CEO.

Increased communication between agents and supervisors is a welcome and palpable change at CaLLogix. Carrie Perry, a supervisor at CaLLogix, began her call center career as an agent at Abacus Communications in September 1999, and thus witnessed firsthand the metamorphosis of the work environment, from a culture of fear to one of greater quality, care and support.

How has the experience influenced her view of what characterizes a superlative call center supervisor and coach? “I make myself available at all times — any time an agent needs to speak to me or has a question. Administrative work can always wait. It’s very important to put your agents first, above everything,” says Perry. “You have to make the time because the agents are the front line of the business, and if they’re not happy

▶ gram, it’s important to be clear about what you hope to gain from doing it and how you think the individual and the organization will benefit. Sometimes the goals of these programs aren’t clear and agents and their supervisors aren’t sure what exactly it is they are supposed to be doing. Self-monitoring is often implemented as a next level monitoring practice. Once an agent meets a certain quality threshold consistently, he or she is allowed to monitor and assess a number of his or her calls and identify areas of improvement. Supervisors can feel confident in allowing this degree of independence and self-management because they have the assurance that the rep is meeting basic quality requirements. This is empowering for agents and increases their buy-in to the overall program.

CMI: How can monitoring and coaching methods increase agent satisfaction and build agent retention?

GIBSON: If the performance criteria and the objectives are clear, meaningful and attainable, if there are rewards associated with meeting the desired performance requirements, if the overall design of the program is fair and positive, then there is no reason these types of programs shouldn’t increase agent satisfaction and build retention. It’s poor design and implementation, negative management attitudes and suspicion and distrust that decreases satisfaction and increases retention. Taking the time to design a sensible, motivation program and incorporating the input and perspective of agents is the key to making sure your program addresses the needs of all your employees. ●

Rebecca Gibson will present a case study on supervisor development at the Annual Call Center Exhibition (ACCE) in San Diego later this month (Sept. 10-13). For more information, visit www.accecmp.com.

and they’re not doing their jobs well, certainly none of us would have a job. It’s important that we cater to our agents as much as possible.” ●

Cliff Hurst will present a session on how to create a new model of quality monitoring later this month at the Annual Call Center Exhibition (ACCE) in San Diego. For more information, visit www.accecmp.com.



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