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Seattle, WA
May 7 - 10, 2012

Session #: 101
Session Title: Driving Peak Performance Through Maximum Agent Satisfaction
 Eric Zbikowski, Managing Partner - MetricNet



Driving Peak Performance Through Maximum Agent Satisfaction

Eric Zbikowski, Managing Partner - MetricNet
 Session #101
 May 8, 2012




Today's Agenda



- 1** **Research Methodology:**
Origins of Best Practices
- 2** **Agent Satisfaction:**
*The Key to Unlocking Everything Else
...But How and Why?*
- 3** **The Creation and Implementation**
of Agent Satisfaction Surveys


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Research Methodology:
Origins of Best Practices




Empirical Observations from the Global Benchmarking Database



- More than 550 Agent Satisfaction Assessments
- More than 1,900 Call Center Benchmarks
- Global Database
- 30 Key Performance Indicators
- Nearly 80 Industry Best Practices

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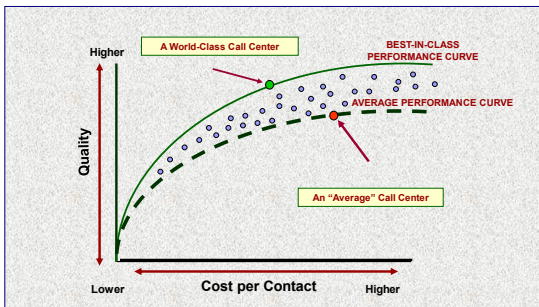
Data Comes from a Variety of Call Centers

- More than 1,900 call centers worldwide
 - From MetricNet's Call Center Benchmarks
- Industries include
 - Banks and financial services
 - Telecommunications
 - Health Care
 - Hospitality
 - Insurance
 - Manufacturing
 - Retail
 - Transportation
 - Utilities
- Best practices are relatively independent of industry
 - At least 75% commonality from industry to industry

Characteristics of a World-Class Call Center

- Call center consistently exceeds customer expectations – regardless of the transaction type
 - Result is high levels of Customer Satisfaction
 - Call quality is consistently high
- Business value is managed at or above industry average levels
 - Cost per contact is below industry average levels
 - Revenue generated is above industry average levels
 - Telemarketing and Telesales
 - Debt collections
- Call Center follows industry best practices
 - Industry best practices are defined and documented
 - Call Center follows industry best practices
- Every transaction adds value
 - A positive customer experience
 - Improves customer loyalty
 - Creates positive brand awareness and switching costs

The World-Class Call Center Defined



But Where Do the Agents Fit into All of This?

Agents are your #1 Customer!

...[A]t Southwest, to ensure the best customer service, you have to put the customers second. With the "Southwest Model for Leadership," employees are the company's No. 1 customer."

- Herb Kelleher, Co-founder, and former Chairman / CEO of Southwest Airlines



Agent Satisfaction:
The Key to Unlocking Everything Else
...but How and Why?



Two Types of Call Center Metrics

Operational Metrics

- Measures operational efficiency and effectiveness of the call center
- Internally focused
- Metrics include:
 - Cost per Contact
 - Customer Satisfaction
 - Speed of Answer
 - Agent Utilization
 - Etc.

Business Effectiveness

- Measures the call center's effectiveness in supporting the company's business mission
 - Typically P&L or revenue related
- Externally focused
- Metrics include:
 - Sales \$ per Call Center FTE
 - Collections \$ per Call Center FTE
 - Call Center Operating Expense as a % of Call Center revenue generated

Business Effectiveness Metrics

- Business effectiveness metrics are highly dependent upon the services you are offering
 - No "standard" set of measures
 - Generally related to product sales, customer retention, and revenue production and/or recovery
 - Lots of room for creativity
- Business effectiveness often trumps operational effectiveness
 - Reflects a focus on revenue growth and recovery
 - Allows some "sloppiness" on the operational side if the call center
- "Crossover Metrics"
 - Cover both operational and business effectiveness
 - Operating cost as a % of revenue generated is common

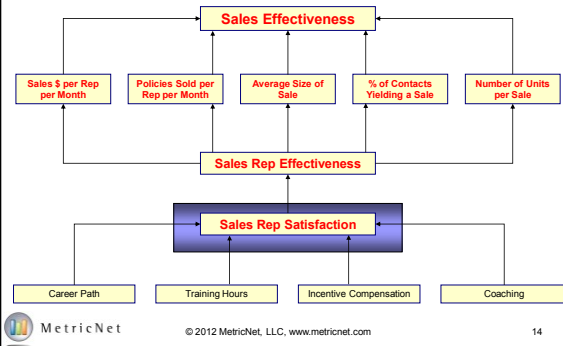


Some Common Business Effectiveness Metrics

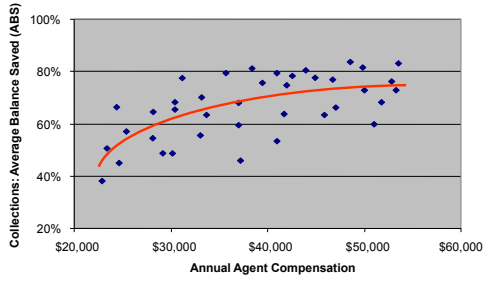
- | | |
|---------------------|--|
| Credit Card | <ul style="list-style-type: none"> ■ Cross-sell/upsell conversion rate (%) ■ Number of Payment plans established |
| Collections | <ul style="list-style-type: none"> ■ Average Balance Saved (ABS) ■ Promises kept (%) |
| Cable TV | <ul style="list-style-type: none"> ■ Number of Appointments scheduled ■ Product count for new accounts |
| Tech Support | <ul style="list-style-type: none"> ■ First Level Resolution Rate ■ % Escalated Level 1 Resolvable |
| Lending | <ul style="list-style-type: none"> ■ Number of loans originated ■ Average loan size and duration |
| Telecom | <ul style="list-style-type: none"> ■ Percent of billing inquiries resolved ■ Customer cross-sell/upsell percentage |
| Retirement | <ul style="list-style-type: none"> ■ Rollover IRA conversion rate (%) ■ Number of Variable annuity accounts opened |



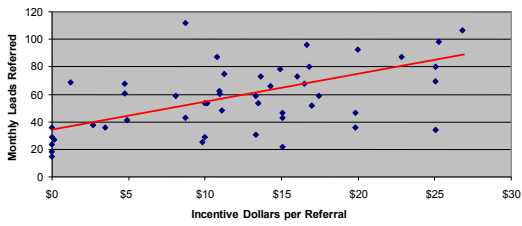
Agent Satisfaction is the Key to Driving Sales



Agent Salary vs. Average Balance Saved (ABS)

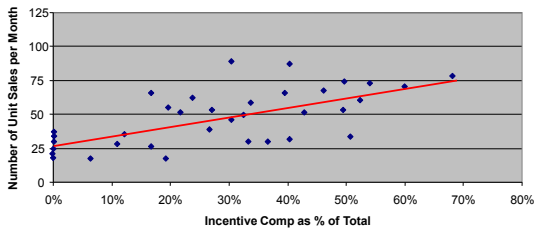


CSR Lead Referrals



Lead referrals are strongly influenced by incentive dollars

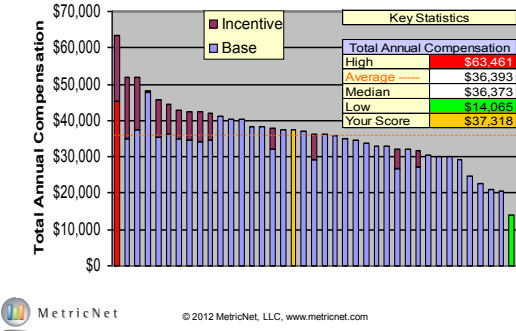
Direct Channel Sales Incentive



Incentive Compensation is strongly linked to sales consultant productivity

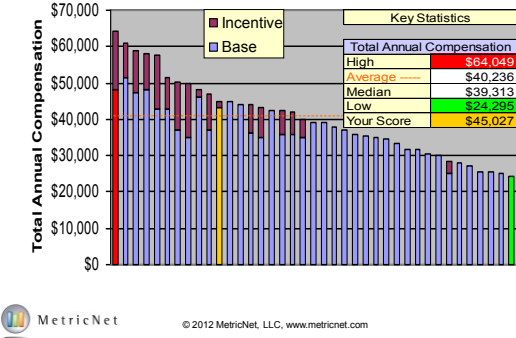
How Well Are Your Level 1 Reps Paid Relative to Others?

Sample Data Only. Not Intended for Benchmarking Purposes.



Agent Level 2 Salaries

Sample Data Only. Not Intended for Benchmarking Purposes.

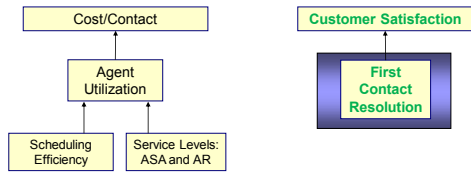


Operational Metrics: Which Ones Really Matter?

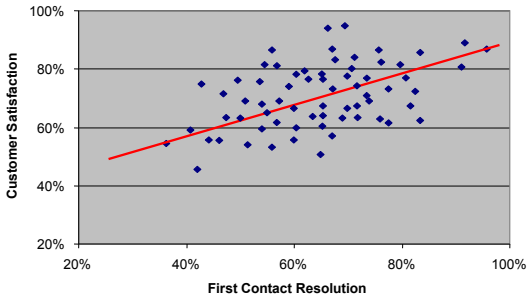
- Cost**
 - Cost per Contact
- Quality**
 - Customer Satisfaction
- Productivity**
 - Agent Utilization
- Call Handling**
 - First Contact Resolution Rate
- Agent**
 - Agent Satisfaction
- Aggregate**
 - Balanced Scorecard

Read MetricNet's whitepaper on **Call Center Performance Metrics**. Go to www.metricnet.com to get your copy.

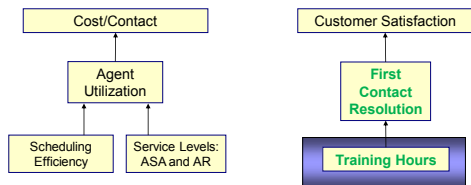
FCR Impacts Customer Satisfaction



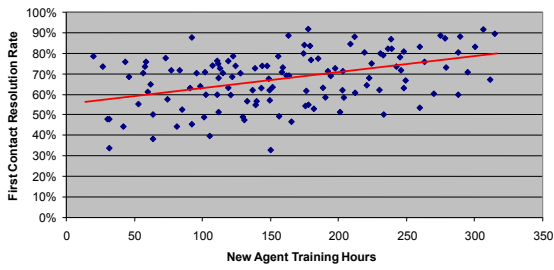
First Contact Resolution Drives Customer Satisfaction



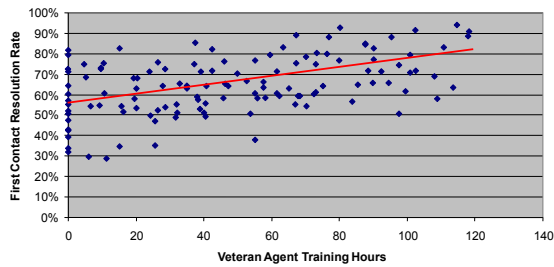
Training Hours Impact First Contact Resolution Rate



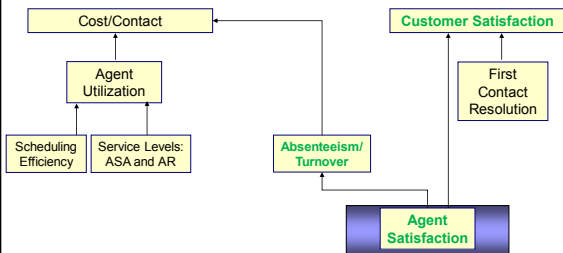
New Agent Training Hours vs. First Contact Resolution

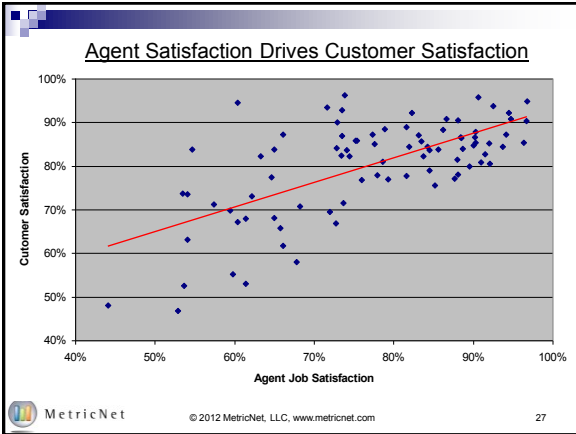


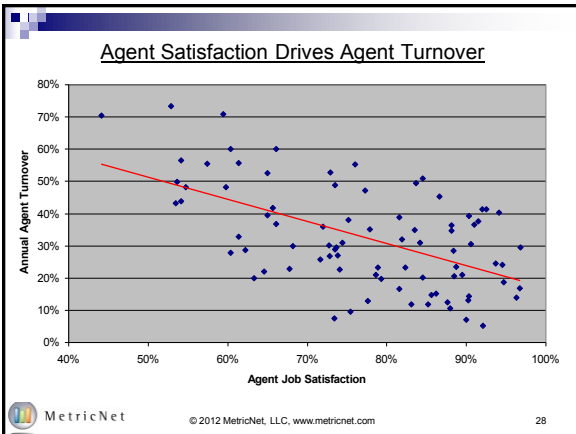
Veteran Agent Training vs. First Contact Resolution

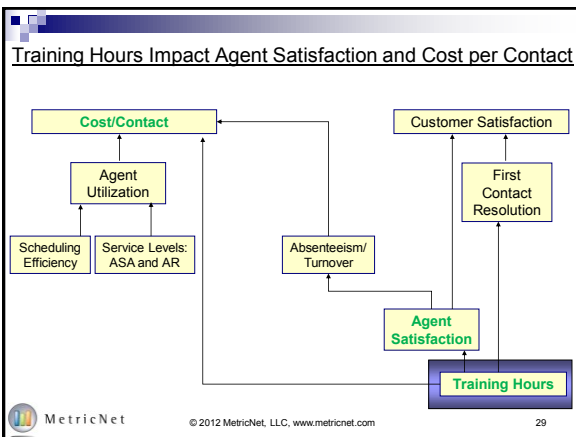


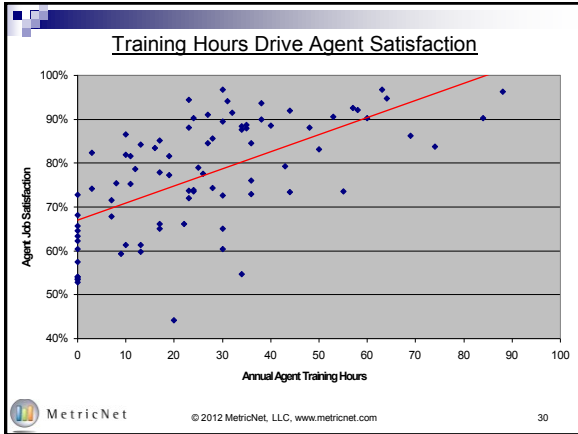
Agent Satisfaction Impacts Customer Satisfaction and Turnover

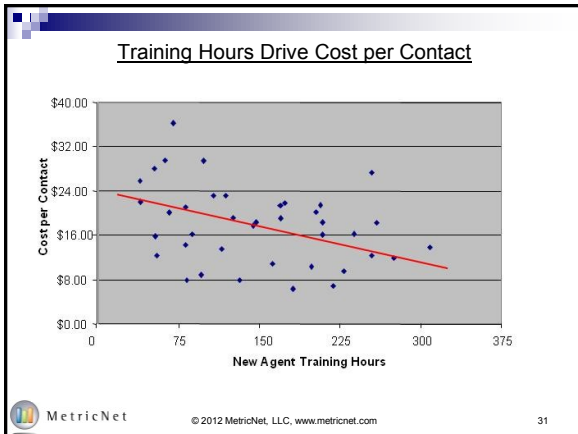


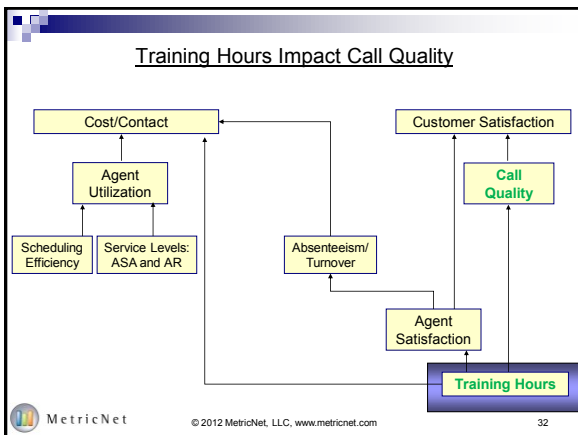


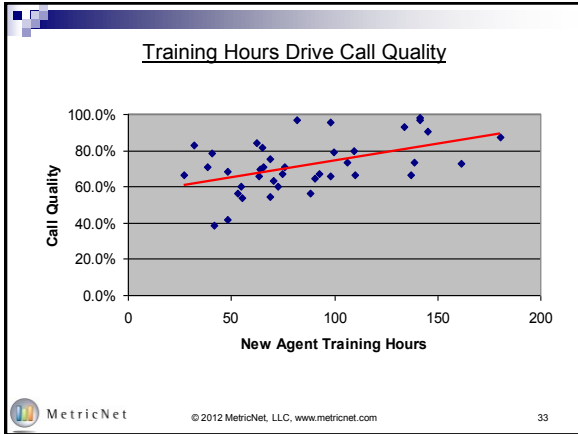


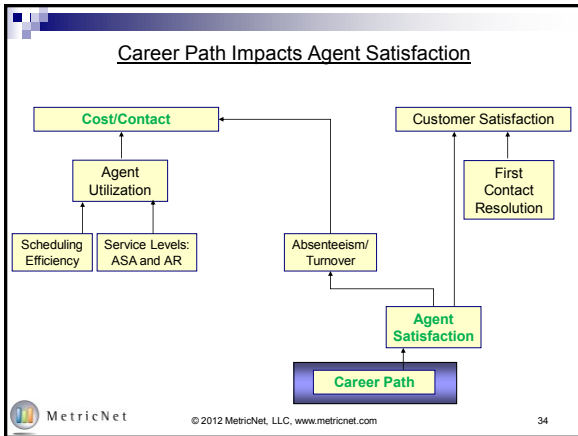


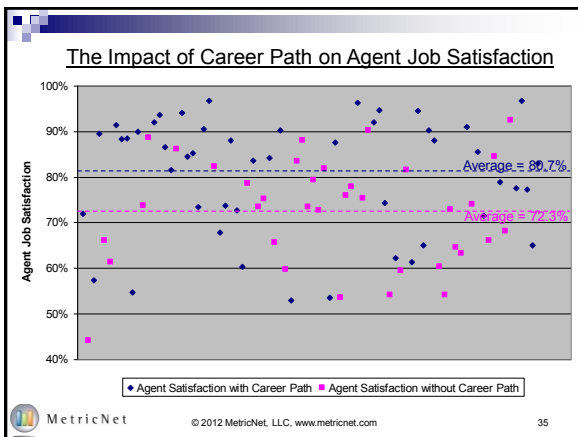




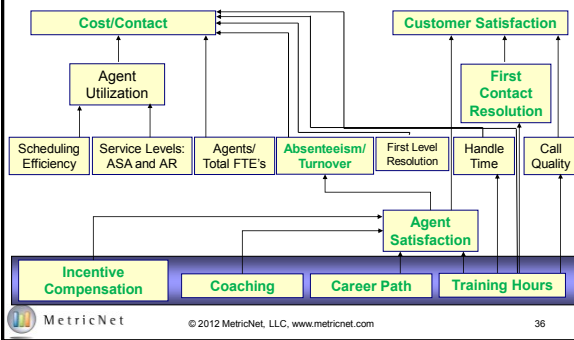








Agent Satisfaction is the Key to Driving Operational Metrics



Operational Benchmarking Performance Summary

Sample Data Only. Not Intended for Benchmarking Purposes.

Metric Type	Key Performance Indicator (KPI)	Your Score	Peer Group			
			Min	Median	Average	Max
Cost	Cost/Contact	\$28.17	\$6.59	\$22.56	\$22.96	\$38.44
	Cost/Minute of Handle Time	\$2.66	\$1.22	\$2.00	\$1.96	\$2.95
Productivity	Contacts/Agent-Month	429	373	487	604	699
	Agent Utilization	46.7%	25.9%	53.9%	53.1%	71.1%
Service Level	Average Speed of Answer (ASA) in seconds	19	12	34	45	187
	Percent Answered in 30 Seconds or Less	96.6%	36.5%	71.3%	72.1%	100.0%
	Call Abandonment Rate	2.9%	1.4%	7.6%	8.1%	25.2%
Quality	Call Quality	68.4%	43.8%	75.8%	79.9%	94.5%
	Customer Satisfaction	63.0%	41.9%	75.5%	79.0%	96.0%
Agent	Annual Agent Turnover	29.5%	1.7%	26.4%	31.7%	94.0%
	Daily Absenteeism	19.2%	0.1%	13.0%	13.2%	29.8%
	New Agent Training Hours	36	20	69	79	241
	Ongoing Agent Annual Training Hours	12	0	20	34	130
Call Handling	Agent Satisfaction (% satisfied or very satisfied)	71.0%	33.8%	70.1%	75.4%	94.5%
	Agents as a Percent of Total FTE's	77.9%	57.1%	69.3%	70.5%	88.4%
	Contact Handle Time (min:sec)	12:41	2:47	9:34	11:18	19:55
	First Contact Resolution Rate	51.3%	45.4%	67.8%	71.2%	94.1%
	IVR Completion Rate	6.7%	0.0%	18.9%	22.0%	44.8%

Read MetricNet's whitepaper on [Benchmarking Peer Group Selection](#). Go to www.metricnet.com to get your copy.

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The Creation and Implementation of Agent Satisfaction Surveys

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Seattle, WA
May 17 - 19, 2012

Components of a Best-in-Class Agent Satisfaction Survey

- ❑ Respect, Coaching, Mentoring
- ❑ Education, Certification and Training (new-hire and veteran agents)
- ❑ Work Environment
- ❑ Company Culture
- ❑ Performance Management
- ❑ Leadership
- ❑ Career Pathing
- ❑ Compensation (base and incentive comp)
- ❑ Responsiveness of Management
- ❑ Communication / Feedback Loop
- ❑ Awards and Recognition / Being part of a "Winning Team"
- ❑ Probability of Recommendation



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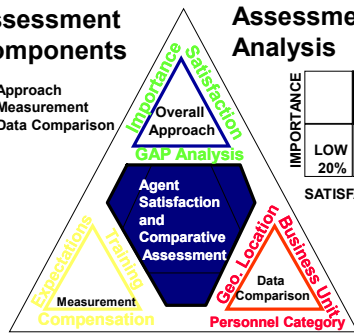
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Identify Purpose and Define Scope

Assessment Components

1. Approach
2. Measurement
3. Data Comparison



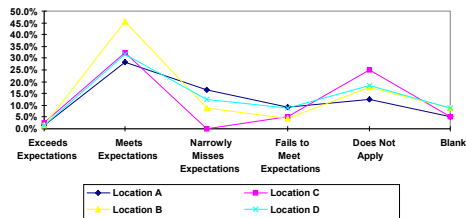
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Share Results

Sample Question: What is Your Overall Satisfaction with Your Job?



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Recommend to Others?

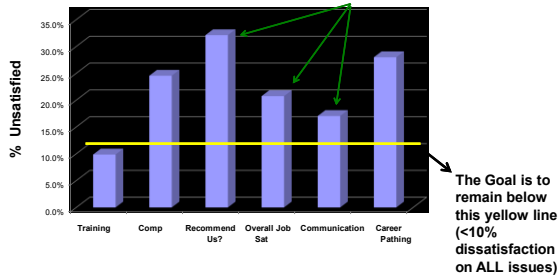
5 out of 7 Agents Surveyed Would Recommend Our Call Center to their Friends and Family as a Quality Place to Work (based on their experience)

Based on your overall experience with XYZ Company, would you recommend us to your family or friends?

Answer Options	Response Percent	Response Count
Yes	72.0%	193
No	28.0%	75

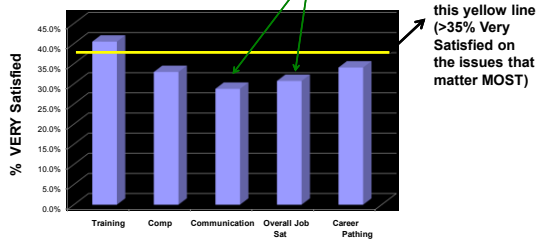
"I Can't Get No....Satisfaction"

Metrics that Matter Most



In What Areas Are Agents VERY Satisfied?

Metrics that Matter Most



Taking Action

- Agent Surveying is a means to an end
- Successful agent surveying goes beyond data collection, to produce actionable insights
 - Near-term goal → improved performance
 - Ultimate goal → world-class performance
 - Key to getting results is to take action:

Just do it!

How Do I Maximize Agent Satisfaction?

KPI	Performance Target	Key Drivers	Performance Target	Best Practice Prescription
Agent Satisfaction	85%	New Agent Training Hours	200+ hours	<ul style="list-style-type: none"> ■ Provide additional training opportunities for new agents
		Veteran Agent Training Hours	100+ hours	<ul style="list-style-type: none"> ■ Provide additional training opportunities for veteran agents
		Career Path	Varies	<ul style="list-style-type: none"> ■ Document agent career path alternatives
		Coaching/ Feedback	Monthly	<ul style="list-style-type: none"> ■ Provide monthly, one-on-one coaching
		Rewards & Incentives	Monthly	<ul style="list-style-type: none"> ■ Offer monthly rewards and incentives ■ Monetary as well as non-monetary

Measure Progress

- Of all the steps in an effective measurement assessment, this one is perhaps the most critical to improve overall perception.
- If progress is not measured at regular intervals, the Call Center runs the risk of setting inappropriate agent goals and priorities.
- As improvements are identified, document progress and present improvement results to senior management.



Continuous Assessment

Consistently measuring and monitoring “the voice of your agents” is important.

- The most successful call centers are those that formally incorporate agent feedback in their continuous improvement program.
- Asking for agent input and then not taking action, measuring progress, or monitoring for improvements is worse than not asking at all.
- Companies practicing *continuous* agent measurement and assessment programs will achieve two to three times the business benefits within the next 5 years than those who practice one-time studies.



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Establish Performance Goals

DOMAIN	PERFORMANCE METRIC	CURRENT PERFORMANCE	PERFORMANCE GOAL
CALL CENTER	Cost per Contact	\$7.90	\$6.00
	Customer satisfaction	71%	80%
	Agent Utilization	49%	60%
	First contact resolution	61%	70%
	Agent Satisfaction	56%	75%
	Balanced Score	52%	70%
AGENT	Customer satisfaction	By individual	85%
	Number of contacts handled per month	By individual	650
	Call quality	By individual	90 out of 100
	First Contact Resolution	By individual	75%

- Define KPI's to track and trend
- Measure baseline performance
- Establish “stretch” goals for each KPI
- Measure performance at least monthly
- Post performance trends and periodically reset goals



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The Technician Scorecard

Performance Metric	Metric Weighting	Performance Range		Your Actual Performance	Metric Score	Balanced Score
		Worst Case	Best Case			
Customer Satisfaction	20.0%	67.0%	84.0%	83.0%	59.3%	11.9%
First Contact Resolution Rate (Incidents)	20.0%	38.0%	84.0%	61.0%	50.0%	10.0%
Incidents Closed this Month	15.0%	19.9	76.9	59.8	69.9%	10.5%
Service Requests Closed This Month	15.0%	15.6	42.2	28.5	48.6%	7.3%
Unplanned Absenteeism	7.5%	0.0%	22.0%	19.0%	86.4%	6.5%
Teamwork	7.5%	0.0	5.0	3.5	69.9%	5.5%
Initiative	7.5%	0.0	5.0	5.0	100.0%	7.5%
Mentoring	7.5%	0.0	5.0	4.5	90.0%	6.7%
Total	100.0%	N/A	N/A	N/A	N/A	43.7%

Step 1
Eight critical performance metrics have been selected for the agent scorecard

Step 2
Each metric has been weighted according to its relative importance

Step 3
For each performance metric, the highest and lowest performance levels in the benchmark are recorded

Step 4
Each agent's actual performance for each metric is recorded in this column

Step 5
Your score for each metric is then calculated: (worst case – actual performance) / (worst case – best case) X 100

Step 6
Your balanced score for each metric is calculated: metric score X weighting



Monthly Technician Performance Rankings

Technician Number	Monthly Ranking	Monthly Scorecard Performance						Six Month Average
		Sep	Aug	Jul	Jun	May	Apr	
11	1	85.6%	98.0%	97.1%	95.7%	98.3%	97.3%	97.0%
32	2	92.8%	92.1%	90.3%	89.3%	84.6%	92.2%	90.2%
21	3	81.5%	88.5%	83.2%	84.0%	83.7%	83.5%	86.7%
35	4	81.0%	86.8%	85.2%	78.0%	80.5%	88.2%	81.7%
14	5	89.5%	89.1%	90.0%	90.1%	92.3%	92.1%	90.5%
26	6	83.8%	84.4%	90.2%	86.0%	77.8%	63.9%	81.1%
25	7	83.0%	73.8%	81.9%	72.1%	84.8%	87.9%	80.5%
15	8	70.4%	66.0%	53.3%	56.3%	58.6%	39.0%	57.0%
20	9	64.9%	66.5%	70.1%	56.9%	40.9%	72.7%	62.0%
31	10	62.3%	47.4%	22.7%	38.4%	26.0%	93.0%	48.3%
16	11	61.0%	62.8%	64.5%	45.9%	41.7%	82.7%	54.8%
17	12	57.9%	42.1%	32.3%	71.6%	62.3%	60.3%	54.1%
33	13	58.8%	75.6%	64.8%	80.3%	79.7%	73.5%	71.8%
13	14	52.2%	34.9%	61.0%	52.8%	58.9%	48.7%	51.4%
24	15	48.9%	68.7%	86.9%	87.7%	83.6%	74.5%	74.7%
28	16	46.8%	45.5%	19.3%	40.3%	28.8%	32.4%	36.4%
27	17	43.7%	28.5%	31.5%	24.3%	22.2%	17.5%	23.6%
19	18	41.5%	28.4%	50.1%	48.1%	71.1%	81.0%	53.4%
23	19	39.1%	52.3%	57.1%	86.4%	87.7%	88.9%	68.6%
22	20	36.8%	18.7%	19.3%	52.9%	66.4%	84.3%	43.1%
12	21	36.5%	43.2%	33.1%	65.7%	60.0%	88.0%	55.6%
30	22	36.3%	22.6%	23.5%	85.8%	81.5%	70.3%	53.3%
29	23	34.1%	44.9%	50.2%	28.3%	48.9%	36.9%	40.5%
34	24	33.4%	37.9%	23.1%	21.7%	29.7%	22.6%	28.0%
18	25	32.6%	63.4%	60.4%	88.4%	63.6%	91.0%	74.2%
	Monthly Average	59.3%	58.6%	58.0%	65.6%	66.0%	68.4%	62.6%

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Your Presenter: Eric Zbikowski



Eric Zbikowski is a co-founder and Managing Partner at MetricNet, LLC. Eric oversees all of worldwide sales, marketing and operations, and assists in the direction of MetricNet's global enterprise. Mr. Zbikowski is a knowledgeable leader with nearly 19 years experience in operational management, customer service and performance benchmarking. Previously, he was The Director of Operations, Worldwide Sales and Services at MicroStrategy - a leading enterprise software company. There, he ran worldwide sales operations and assisted in the execution of an overall sales strategy. Prior to that, he was Director of Sales and Marketing at The Corporate Executive Board - a global research firm focusing on corporate strategy for senior executives. Previously, he was a Vice President of Consulting at META Group - a leading information technology research and advisory services firm, where he helped create and launch

META Group's Call Center Benchmark, and fulfilled numerous help desk, call center and customer satisfaction engagements for Fortune 2000 companies. Prior to joining META Group, Mr. Zbikowski worked at The Bentley Group, A TSC Company, where he managed and directed the Information Services Division, focusing primarily on customer satisfaction, competitive analysis and performance benchmarking. Mr. Zbikowski also spent 3 1/2 years at Gartner Group, where he was well-published in performance benchmarking. There, he served as a regular speaker at conference seminars and co-created/launched a quality-management, customer-satisfaction benchmarking service used by CIO's of Fortune 500 companies. Mr. Zbikowski graduated cum laude in Economics from The Wharton School at the University of Pennsylvania, with a dual concentration in entrepreneurial management and marketing.

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