Call Center Times

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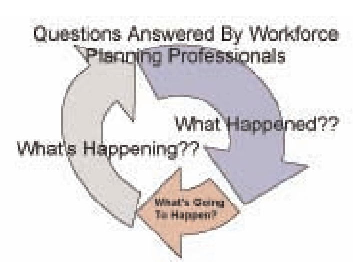
The Importance of Planning:

Do We Have The Cart Before The Horse?

Ric Kosiba, Ph.D.
President, Bay Bridge Decision Technologies

The Planning Life Cycle

In call centers, our planning cycle is very interesting and, for most of us, a tad convoluted. When speaking to workforce management professionals, we find that most workforce planning time is spent responding to plans gone awry or explaining why plans were not achieved rather than on real planning activities. We are, by and large,



unplanned planners spending most of our time fixing unplanned events.

We generally spend our time answering three questions (and usually all at once):

What Happened?

When forecasts are not met, or performance is below goal, we must go back and determine what happened. It never matters whether the blip in call volumes was caused by an unknown marketing drop or some unexpected world event, the blame usually falls our way (or certainly feels that way).

This question generally consumes maybe fifteen to thirty percent of a workforce manager's time and the research associated with this activity is both time consuming and very frustrating.

What is Happening?

The natural companion to the question "What Happened?" is the question "What is Happening?" When unusual or unplanned volume or handle time spikes (or valleys) rear their ugly head, this is our time to spring into action. It is our job to recommend overtime (or early release), recommend bringing additional resources to the phones, and possibly reorganizing the call routing or work flows.

This one question, and its corollary question, "How Do We Fix It?" consumes us. It is tied to our day-of monitoring and people management, and our short term scheduling. This part of our job can take about fifty to seventy percent of our time.

What if I told you some of this chaos is self-inflicted, based upon the modeling assumption of our workforce management system?

One fun fact that one of our engineers at Bay Bridge discovered (see D. Newhard) is that using average call arrival distributions leads to inaccurate forecasts. By averaging historical call volume intervals over time, you throw away all of the normal variability of the day. Each actual day's data, with all its call volume ups and downs and handle time highs and lows, gets averaged together within workforce management software to give you forecasts that are, intraday, medium volumes and medium handle times. In other words, our workforce management tools tend to dampen the variability in our forecasts that are all too present in the real world. I'm hoping to elaborate on this in a future discussion.

What is Going to Happen?

I will argue that in our day and age, given the state of our organizations and our current technology infrastructure, *this question is absolutely the most important of the three questions*.

This question does not usually consume us - except during budget season. It gets put on the back burner while we spend our time managing and fixing the here and

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now. Because of its vague and futuristic character, its inter-office political nature, and because its repercussions can be put off into the future (and maybe hoisted onto some other group), it is given little analyst time. Like kicking the can down the road, kicking future contact center issues down the road is natural to contact center operations. Most of the workforce management folks say that this question takes between ten and twenty percent of their time.

And I believe this is the most important area to get right.

Do We Have The

Cart Before The Horse?

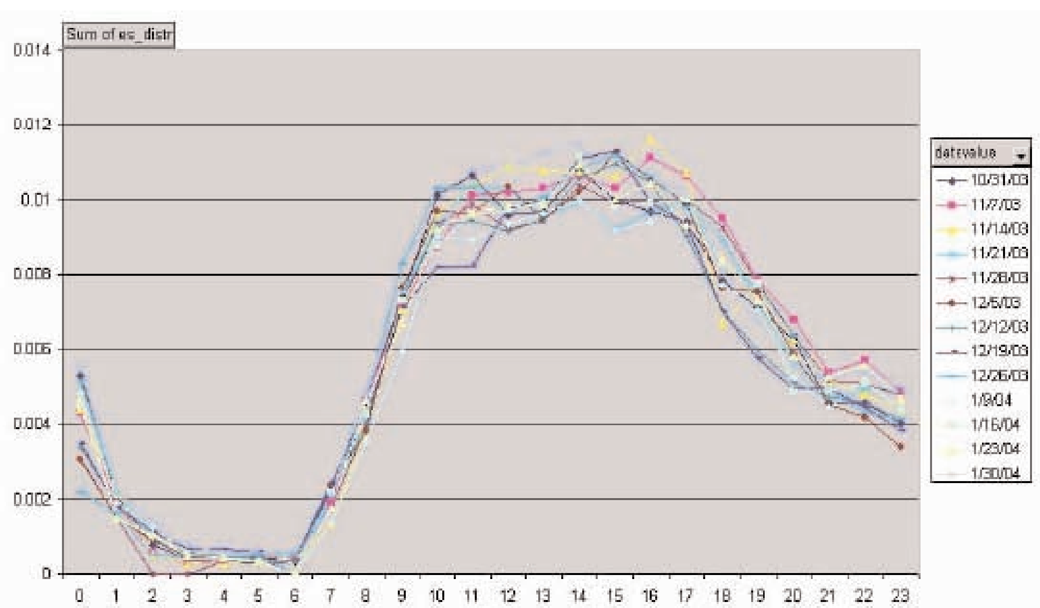
Fifteen or twenty years ago, when workforce management software was in its infancy, contact center managers had a very complex and tactical problem to solve. They needed to know how to efficiently schedule their employees and they knew that that business problem was much too complex for them to solve using a pen and paper or using the early spreadsheets (remember scheduling using those long sheets of paper!?!). And so an industry was born. It was a great thing for all of us (as well as our company's shareholders).

After improved scheduling came more business problems that workforce management software helped us solve (e.g. adherence monitoring and vacation planning).

Is there much value left to squeeze out of better scheduling? As is typical of all business problems, we nailed eighty percent of the value with twenty percent of the effort. We've spent the ensuing years attacking the last twenty percent of the value.

But are we spending our valuable time on the right business problem? When we first tackled the problem of putting together tighter employee schedules and tracking schedule adherence, we saw terrific incremental efficiency improvements. Are there more improvements to be made in workforce management?

The following graph represents the staffing distribution of a large and seasonal contact center group over three months. During those three months, the contact volume changed significantly. But notice this: the staffing distribution remains constant over time. I have looked at contact center data across all sorts of businesses, and this consistent staff distribution phenomenon is itself a call center truism. In the end, given all that we workforce management folks do (or maybe because of what we do), and given all that our call center managers do, these distributions remain constant over time.



But what does this tell us? We do a great job of using our current tools- or at least a consistent job of using our current tools. Given all the variability of call volumes and handle times, we consistently get a good match between when our calls come in

RANTS & RAVES!

Randomly Timed Musings

Is Your Operation Brand Driven?

By Kathleen M. Peterson
Chief Vision Officer, PowerHouse Consulting, Inc.

Consider popular book titles such as "Execution" and "Confronting Reality." These focus on the importance of making things happen, getting things done, and the significant (in fact, crucial) impact this has on overall company performance. What books like these really deal with are *Operations*. Operations are present throughout the enterprise and represent all manner of activity. In many companies they are important enough to warrant a Chief Operations Officer, or Senior VP of Operations. According to Wikipedia, "the focus of the COO is on strategic, tactical, and short-term OM (Operations Management) which means he or she is responsible for the development, design, operation, and improvement of the systems that create and deliver the firm's products/services." COO's everywhere are facing a new and complicated challenge - to integrate the company Brand into the operational side of the enterprise house.

Customer Care is an operation. Back office activity is an operation. Distribution is an operation, Manufacturing … the list goes on and on. When we are responsible for managing an operational area within an enterprise we must focus not only on the functional activities but on the *manner* in which these activities are "executed" - herein is the distinction of the "Brand Driven Operation."

A *Brand Driven Operation* understands the impact its *performance* has on the customer experience and on the Brand itself. Brand has been traditionally thought of as a marketing function. But it is much more than the packaging, logos, advertising, and "spin" that surround a product or service. Brand has emerged in the customer experience revolution as a means to define the behaviors, processes, talent requirements, cross-functional effectiveness, and all other aspects of execution associated with the delivery of the Brand "promise." Brand must manifest as an experience. Brand is a company's identity in the marketplace and is, at least in part, responsible for attracting customers. It is *branded experiences* that retain customers.

When a company's Brand promotes high quality products or services, operations better be up to the task of delivering on that promise. The translation of Brand to operations is the job of the leader. The leader must understand the tasks, tools, cross-functional relationships, and behaviors required to deliver on the promise of the Brand. Leaders must also understand the budget requirements to deliver on the Brand promise and be able to build a compelling case for investment.

If your operation's objective is quality, there must be cross-functional responsibility. For example, if Manufacturing has their priority wrong and focuses more on speed or cost-cutting than on quality, no amount of being nice or possessing excellent communication skills in Customer Care will repair the Brand damage done by poor decisions made elsewhere. And it is unlikely that a peer leader will be able to alter decisions made in another area. The data that proves the impact of such decisions is the kind of compelling evidence that spurs action from the COO types of the world, and they can actually influence changes of a significant nature within the enterprise. When there are failures in cross-functional relationships that damage the Customer Experience, data … data … data is the driver of significant change.

When the Brand promise includes promptness and accuracy (critical for Insurance, Finance, Utilities, etc.), but the back-office operations are flawed, the experience and the Brand can be exposed to damage - not to mention the additional contacts from customers to straighten out messes or inquire as to status. This is all pure cost, offers little value, and provides little opportunity. It is very difficult to up-sell a customer with troubles.

So when it comes to the Brand Driven Operation, understand the promises that your company has made to the customer. Evaluate your operation's effectiveness in meeting that promise. Ask questions: Do you have the right people, tools, processes, training, leadership, and BUDGET to deliver? Are your cross-functional relationships healthy? Do you genuinely share being Brand Driven? Are you collecting data that identifies improvement opportunities? Then think about it. Then do something about it!

I long to accomplish great and noble tasks, but it is my chief duty to accomplish humble tasks as though they were great and noble. The world is moved along, not only by the mighty shoves of its heroes, but also by the aggregate of the tiny pushes of each honest worker. Helen Keller

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and when we have folks available to answer them (which is apparent when you match the staffing distributions against call volume distributions). This is a huge achievement.

So what is left to do? The big business problem to solve is that of getting the right number of employees in the door in the first place. Much of the problems we see day-to-day are not associated with day-of issues, they are instead the issues associated with poor long-term planning. What keeps us busy now is time associated with managing the chaos of an earlier long-term planning mistake. By planning better in advance, there is less time spent on firefighting and more time and effort is focused on fire prevention. Improved long-term planning leads to less day-to-day troubles and a better managed call center.

Our experience also suggests that there are huge savings available to solving this problem well. Maybe it is time to get the eighty percent associated with answering that third question?

About the Author
Ric Kosiba is one of the founders of Bay Bridge Decision Technologies and serves as its President. He leads the development of the company's simulation and optimization technologies used in call center applications.

He is expert in the field of call center management and modeling, call center strategy optimization (where he holds a patent), and the optimization of large-scale operational processes.

Ric received a Ph.D. in Operations Research from Purdue University, a M.S.C.E. and a B.S.C.E from Purdue's School of Civil Engineering.

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DialResults© Lowers Costs on Multi-Site Call Centers through the use of VoIP Technology

DialResults C3 TM call center software allows businesses to cost effectively implement multi-site contact centers. VoIP based multi-site contact centers have many compelling advantages. For example, C3 is a great solution for hosted call centers that have agents located throughout the world. The only requirement is that the agent has a high speed Internet connection. C3 can provide intelligent skill based routing across the centers entire network to move the customer instantly to the best pool of agents with skill sets to handle the customer's needs immediately. Finally, VoIP technology allows call centers to minimize costs by eliminating costly technological boundaries of traditional CTI applications and reducing phone charges.

DialResults provides a full range of IP based PBX solutions for today's multi-site contact center environment. DialResults distributed call center architecture offers many advantages over the traditional PBX/ACD's and older predictive dialer technology because DialResults centralized IP-based predictive dialer system is extremely scalable, easy to use, and has more functionality at a lower cost. This gives owners a higher ROI than traditional call center systems.

VoIP Multi-Media Contact Centers:

A few years ago, traditional telephone voice calls were the norm for call centers for both inbound and outbound calls. It was the only way to contact the consumer. In today's marketplace, consumers and business are using many different technologies to conduct business including e-mail, web collaboration, voice calls, fax, etc.

Contact centers which are not equipped to handle these new types of customer service will go by the wayside.

Benefits of Using Remote Agents:

1. Lower operating costs.
Agents' working on the DialResults C^3 hosted dialer solution from home means a business does not have to invest in a building.

2. Lower telecommunications cost.
Routing calls over the DialResults VoIP network will dramatically reduce a contact centers costs for both inbound and outbound calls.

3. Seamless service.
An agent's physical location is transparent to everyone: agents, callers, and called 3rd parties. DialResults also allows the contact center to maintain high-quality service, when one contact center location is closed or reaches its call handling capacity, calls can be automatically routed to another location.

4. Easy administration.
Separate sites can be difficult to administer centrally with one management team.

DialResults C^3 VoIP predictive dialer allows ease of use and administration with a centralized management team.

Travis Sibley
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Tips for Creating A Highly Efficient IVR System

Enterprises are increasingly turning to interactive voice response (IVR), a technology automating telephonic interaction enabling customers to retrieve data such as bank balances, flight schedules, product details, order status, movie show times from any telephone, says Dawn Wood, Business Unit Executive at ATIO. IVR can also be used to deliver or gather information for appointments, due bills and other time critical events and activities.

In order to reap the

most rewards from the IVR system, companies must fully understand how IVR works. An efficient IVR system allows companies to provide customers with an invaluable interaction channel. Instead of always speaking to an agent, customers may alternatively obtain the information they require through IVR. Wood provides the following useful tips for creating a highly efficient IVR system.

1. Leave simple, mundane and repetitive enquiries to the IVR. Calls related to frequent enquiries such as exam results, account balances and other account queries can be efficiently handled by the IVR system. Mundane tasks do not inspire or properly use an agent's knowledge and cognitive skills.

2. Check where and how the information is stored. Some technologies may not access customer or company information due to where and how it is stored. Ensure that the information in the database is accessible to the IVR technology in use.

3. Find out if your target market is receptive of the IVR technology. Conduct a short survey with your customers on what they think of IVR. It is encouraging to note that around 80% of South Africans are already accustomed to automated voice service used on cellphones.

4. Be available when your customers need you. If the service you provide is such that your customers may need to contact you at night, it is imperative that you at least have an efficient IVR in place, ensuring that your contact centre provides consistent and uninterrupted service.

5. Use your IVR to prompt for a message and respond promptly. Not responding in a timely manner will affect the company's credibility and discourage people from using your IVR technology as they will deem it a waste of time.

6. The application must narrow down the search as much as possible. Customers are not interested in listening to the automated voice for too long before being assisted. You need to prompt the callers for what they specifically require by being product or service specific and less generic.

7. Provide not more than four options. Minimal options make it easier for customers to remember all available options.

8. Present the most frequently required options first. This will save your customers more time as they won't have to listen to all the available options before making a selection.

Taking heed of these tips will make your IVR system user friendly and allow your company to reap maximum benefits from the system, says Wood.

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Avoiding the Landmines of the New Call Center Supervisor

If you are a new call center supervisor, or the manager of new call center supervisors, you need to acutely aware of the pitfalls that can be encountered on this job. Knowing these will help you guide and direct your team to greater levels of productivity and success. Anne G. Nickerson shows you how.

Career paths in the contact centers have historically been very straightforward and clear — promote the highest performing agent to a supervisory position, and then require the new supervisor to expertly manage and develop his/her peers. While simple in theory, "This model is wrought with problems," says Anne G. Nickerson, President of Call Center Coach, "think about it – you remove your top perfomer from the floor; you ask him/her to get the team to produce, "like you did"; and then the new recruit to manage the same people they used to gripe with in the lunchroom! We need to do a much better job of bringing these new recruits along," declares Nickerson, "and give them the tools to avoid the landmines of the job."

Nickerson helps new supervisors avoid pitfalls in a provocative and entertaining new book, **Not by the Seat of My Pants: Leadership Lessons for the New Call Center Supervisor**. In the book, Anne G. Nickerson addresses the issues of the new supervisor, and provides practical insight and management lessons for becoming successful on the job. The story, told from the point of view of Chris, the newly promoted agent-turned-supervisor, walks through the key challenges faced during the first two months on the job. Directed by coach Stephanie, Chris learns quickly what it takes to succeed, and the top 10 lessons are noted below.

1. Building High Performance Teams
2. Facilitating Productive Meetings
3. Interviewing and Hiring Top Performers
4. Understanding and Utilizing Reports
5. Managing Differences
6. Improving Time Management Skills
7. Doing What You Value and Valuing What You Do
8. Defining Customer Satisfaction Action Planning
9. Improving Employee Satisfaction and Motivation
10. Establishing Career Development Plan

New call/contact center supervisors have their work cut out for them. All too often talented new supervisors believe they've been set up to fail, but, declares Nickerson, "it doesn't have to be that way, if you know how to avoid the landmines of the position, and where to turn for help."

The following is an example of an excerpt of one of the lessons Chris learns from Coach Stephanie.

What is a Coach?

The coaching process should be thought of as a partnership—one that requires the joint efforts and commitment of the employee and the coach. But, let's face it—this is not an easy task and it is critical that both parties understand *why* the coaching process is so important.

The idea of the leader as a coach is not new. Successful coaches have to assume a variety of roles as team leader, supervisor, facilitator, director, listener, mentor, counselor, and manager. At the same time, organizations are changing, doing more with less, and decision-making is being pushed down the line.

So, what exactly is coaching? Coaching is the one-on-one ongoing assistance given to a team member in the process of actual job performance. Its goal or purpose is to prepare an associate to perform well in their job and to maximize their potential.

Coaching involves direct guidance in the actual job setting to ensure that development occurs from the coachee's attempts to do the task and master the new skill.

There are three main roles that a coach plays in the work environment:

Educator
Mentor
Motivator

EDUCATOR

In the role of educator, the coach needs to provide coaching during the following instances or situations:

Need for growth
Need for basic information and tools
Need to use frustrations positively
Need to support self-managed change

Need to transfer accountability for complex tasks
Anytime something new is added

For example, coaching is necessary in the following instances:

New hire
New job responsibilities
New products
Need knowledge or skill
New equipment
New systems or tools

How coaches educate others is critical. Imagine that you recently purchased a new digital camera. How best would you learn to use it? What are some of the ways other people might learn to use the camera? Some may prefer to read directions and follow step-by-step instructions, others would rather learn by doing, and some prefer to see a "how to use" demonstration.

Ask someone how they prefer to learn, rather than educate using your favorite style.

MENTOR

In the role of mentor, the coach needs to provide coaching during the following instances or situations:

New relationships
Protocol
Career development
Political savvy
New potential roles
Self-managed changes

MOTIVATOR

In the role of motivator, the coach needs to provide coaching during the following instances or situations:

Supports and validates strengths
Connects energies to opportunities and people
Clarifies focus
Sets up opportunities to succeed

Consider the following questions and ideas to ensure quality coaching:

What have you seen done effectively?

____

What could you do to motivate your employees?

____

Brainstorm around these topics:

Challenging and interesting work
Recognition and appreciation for accomplishments
Keeping up to date with what's happening

Finding a balance to fulfill the three main roles of the coach is important to ensure success. Consider the following when pondering the importance of coaching:

Think back in your lifetime of people who have helped you learn something, or who have supported your personal or professional growth. List their names here:

____

Think about their behaviors and what they did to encourage you.

Remember, too, that good coaches should be role models. A good coach should:
Be willing to share what they know
Be communicative
Enjoy what they do and have a positive attitude
Be patient with failure
Reward success
Be fair and objective

Check those traits that you have already incorporated into your coaching relationships, and circle those that you still need to improve.

To order a copy of the book, go to www.CallCenterCoach.com and select the #4 (Shop) on the telephone key pad, select the book and follow the instructions for payment. If you would like to receive a free chapter, send an e-mail to info@CallCenterCoach.com and put "Free Chapter" in the subject line.

About the Author:

For 25 years, Anne G. Nickerson has been developing the potential of people through organizational design, executive coaching and management development activities, and past 10 years have been focused in the call/contact center industry. She is the principal founder of Call Center Coach, LLC, and is a widely recognized contact center consultant, author, speaker and coach. For more information, visit www.callcentercoach.com. You may speak with Anne directly by calling 1-860-849-1618. If she is not available, she will return your call within 24 hours.

###

Make 2008 a WOW Year!

By Kimberly King

January always promises a fresh start – a time to reflect on past experience and make the most of the New Year. As you have made personal resolutions for 2008, what are you and your team doing to make 2008 a year of achieving WOW results for your organization? Here are some tips from InterWeave's 2008 monthly calendar, ***Create Ultimate Customer Experiences***, that can help propel you to define and meet your goals for this year.

Being a WOW organization means that you are taking ownership for the relationships that you build with your customers and you are committed to creating WOW customer experiences. Being a WOW organization does not mean saying "yes" to all of your customers' needs. It means guiding the interactions so that you can be efficient and dependable while demonstrating respect, consideration and genuine care for their needs and concerns so you can create lifetime loyalty with your customers. If any of their needs go unfulfilled, the customers will experience a void in their relationship with you. By taking ownership for these valuable relationships, your organization will experience great financial rewards while your employees will reap higher levels of

personal growth and a greater amount of accountability and responsibility.

It takes a strong commitment to meet all of your customers' needs on a continual basis. It's easy to fall into the trap of thinking that "good is good enough". WOW means always thinking about what is possible and stretching for higher levels of performance, rather than focusing on the status quo. It's easy to ask yourself, "Did we meet our goals this month?" An organization focused to WOW asks themselves, "What else can we do differently to exceed our goals next month?"

Always keep stretching the possibilities to see how WOW you can be. Here are the steps to take to identify how WOW you are and the gap between your current performance and WOW performance:

Identify your measurements of success. (i.e. number of new accounts or sales, length of time it takes you to open an account, number of interactions it takes to resolve a customer's issue, amount of money you have collected, etc.)
Stretch your definition of your goals to ensure that you are measuring all possible indicators of success. (i.e. number of people who attempt to order from your web site who then call you because they did not receive all the necessary information)
3. **Identify your individual results for each of the goals.**
4. **Examine the results of your best performers.** These goals are used as your starting point.
Discover the behaviors that are impacting the results. Not asking all the right questions could result in a low number of sales or not empathizing with customers could be creating dissatisfied customers.
6. **Determine the appropriate behaviors that will create the desired results.**
7. **Put the behaviors to work and watch your results grow!**

It is important to remember that "What we tolerate becomes our standards." As your culture evolves and becomes focused to WOW performance, it is critical to continue extending your definition of WOW and your Range of Tolerance™ for desired performance. Doing so ensures that you are always growing and achieving your goals for this year and beyond!

As president of InterWeave, a performance management consulting firm, Kimberly King models being a WOW mentor and provides you with the tools you need to drive change. Portions of the concepts and recommendations in this article appear in InterWeave's ***2008 Create Ultimate Customer Experiences Monthly Calendar****. Order this valuable tool, designed for frontline Representatives as well as senior Leadership for only $9.95 per calendar. You can also engage Kimberly as a speaker for your next event to help drive exciting changes in your organization. Visit www.interweavecorp.com or call 877-969-3283 to learn more and begin your* ***Journey to WOW!***
###

TRAINING THE Contact Center Trainer

They Shoot Trainers, Don't They? That's a quote from my friend and colleague as she opened her talk on the subject of training. Gosh! I wish I had said that. Being a trainer of Contact

Center agents and customer service representatives can be a wonderful, fulfilling experience, and at times, it can be a real challenge.

At a holiday party that I attended recently, a lady asked me, “What do you do?” I replied, “I’m a Call Center Trainer and a consultant on the “Positive Coach Approach. @ “Oh really,” she said, and continued, “Are you training them not to call during my dinner time with their absurd surveys and ridiculous offers and asking questions that pry into my life or ask for money?@

I took a couple of deep breaths and said, “In our programs, we do everything we possibly can to lessen the bad rap on telephone solicitation and teach consideration and caring for the potential customer or donor.

There are a few misguided agents, sales people and operators but it=s because of their training.”
She jumped in with more upsets and stories about the problems she has with the do-not call list. So I added this: “Still, there are a few who may be inconsiderate. It’s a shame that a great and growing industry has to suffer because of the actions those few people who present a bad mannered image. You see, Customer Contact Centers’ solicitation involves much more than just calling to houses. It’s the absolute best way to find out the publics= reaction to problems, polling political candidates and obtaining support for the arts or other charities. We also have helped companies prosper

who do not wish to call home to the consumer but wish to respond to Inbound Customer Service calls and offer additional products or services." She pelted me with more blows and vented all over me. So, I got to show off my style.

I put the LAMA Technique to work. "By the way, did you know that more than six hundred thousand call center agents handle about eighteen million Americans every day by phone? Most of those calls are business-to-business, and they do a fine job of bringing much needed products and services to consumers' and business peoples' attention. The world really does operate by telephone. Things are changing all over the globe and although it's not perfect yet, we're doing our best to make Customer Contact Centers more considerate helpful to the public at large. We would like the Contact Centers to be reputable place to work and have it considered an honored profession. **Do you ever call Customer Service?"** She said why yes…and she saw, I was going to be convincing so she gave up! We drifted on to something less controversial to discuss.

I want to tell all trainers, customer service, sales account managers, and agents out there that I'm proud to be a telecommunications expert, and I'm proud to stand up and tell anyone what we're doing to make it better. I hope you will join me. I want to all agents to wear a t-shirt that says: "I came here on purpose."

This article works to assist trainers everywhere in the exciting and rewarding job of training contact center agents. You are welcome to take any hints, suggestions or "good ideas" you find here and make them your own in the interest of furthering our great profession. Check my website for more tips: www.TrainYOurCallCenter.com

Training people well produces excellent results. If you give the agents, CSR's, account managers and sales people the tools they need to succeed and back it up with coaching and quality call management, it won=t be long before people will respect the job you do and your contribution to your call center and world will be huge.

Business owners must hire people with good traits and abilities and mold them into a Customer Contact Team or people who respond to the needs of their customer. Hire people who impress your customers and make the company who hired them proud of their purpose. Train your people to develop special skills that are essential to obtain the kind of performances needed to successfully compete in today's fast-paced world, and kill the bad rap on telephones in general.

Develop Telephone mastery as a skill and every person in your call center can be just that. Anyone who comes in contact with business prospects, customers or clients can learn it. **What do I mean when I say "telephone mastery?"**

! It's the ability to sound energetic while being sincere.

! It's knowing how to use tone, pace and timbre to convey a pleasing, interested and helpful attitude.

! To be perceived as a valuable source of accurate, precise product information presented in a consultative way.

! It's knowing how to listen actively, acknowledge the prospect's or customer's response, make an appropriate comment or selling statement, and ask non-intrusive, probing questions.

! It's being able to determine the

prospect's or customers behavioral style, so the agent can deal with them in a way that is comfortable for the customers and the agent.

! It's knowing what to say and how to say it in a compelling, non-manipulative way that sounds professional and convincing.

! It's being able to recognize buying signs and knowing how to react to bring the prospect quickly and surely to the close.

! It's being able to find the prospect's "emotional need quotient" (why he/she is interested in talking with you) and what's driving the decision to call or respond to your call.

I know you must be thinking, "This sounds long and involved...I wasn't planning to go to this extent in training Customer Contact Agents. Couldn't I just give them a clever script to read and do just as well?"

The correct answers to your questions are: Yes, No, and Probably Not. It depends on what you intend to achieve through the sales agent and the campaign's purpose, the type of product or service you're marketing, and the restrictions imposed on what your agents can or cannot say. It depends on the willingness of your agent who is a customer service representative to take on the job of up selling and cross selling.

Scripts are a useful and necessary training tool, but my philosophy is “that **scripts are better said than read.”** Nothing can be more boring than listening to someone read a “pitch” to you over the phone, especially if the energy level is low and the script drones on and on. No interaction? Only words and features and benefits but not caring what the customer says except if the customer says: YES?

Verbatim Scripts tend to take the personality of the caller out of the picture, and eliminate the possibility of establishing an interactive relationship.

I recommend that sales agents, contact center representatives of all kinds memorize scripts or call guides as quickly as possible (which gives them confidence), and then let them use their developed skills as outlined above to react to situations as they develop in the conversation. The most successful type of outbound call sales today is dependent on **Consultative Selling**.

This means finding the prospect’s need and filling it, and this requires conversational skills to do it well. Training others in Conversational Skills and the Art of Communication as well as the Art of Asking Questions will build the call center agent’s self esteem as well as the ability to consult and support your customer. It’s a new world.

Since this article is about training the trainers, let’s get on with what and how to teach people the necessary skills to be good with the customer they have made contact with on the telephone.

There are two major areas to consider when addressing Customer Contact (sales/service) training.

The first area is **product knowledge**, and I’ll assume that you will hire or select people already knowledgeable about your product or service, or that you will provide call guide information to them that will provide the necessary features, benefits and competitive advantages.

Preparation breeds confidence. Training must be about the product and way it support your customers.

The second area is **communication and selling skills**, usually this area needs help. With that thought in mind, let's concentrate on how to develop conversational skills and call path control skills.

Training can be conducted in a group environment or one-on-one. The approach may be somewhat different depending on the size of the groups, but all in all, the basics are generally the same.

! TRAINING AIDS

I recommend using visual aids in the form of slides and workbooks to the greatest extent possible because they tend to stimulate interaction, hold the trainee's interest, and act as a pacer for the trainer to keep the training moving. I insist on trainees taking notes. The act of writing down major points in the trainee's own words enhances retention and understanding.

If possible, provide a trainee's workbook for this activity and encourage note-taking in the form of interesting comments, thoughts, ideas or "gems of wisdom." Don't be afraid to say, "Write that down." Make the trainees fill in the blanks, it's not old fashioned, it learning to remember by hearing, seeing and writing it…it works!

! DESIGN THE TRAINING TO BE INTERACTIVE

Use lots of questions, answers and skills practice in the form of role-playing to make the training lively and fun. Use questions that are understood and that the trainees know the answer to, no tricks, it's no a safe environment when you ask questions you know the trainees don't know. Avoid lecturing and talking down, use personal experiences. This will endear you to the trainee. Keep the atmosphere light, but at the same time you mean business!

! **INTRODUCE YOURSELF AND THE TRAINING**

State the purpose of the training, and your expectations. Set the stage by telling the trainees how long the training will last, and how it's going to be accomplished.

! **GET A "BUY-IN" FROM THE TRAINEES**

This means give them a reason to want to take your training." **This is the most important contributing factor** to a really successful effort. It makes all the difference between trainees just "showing up" and resenting or resisting your every comment...or active, eager participation where they will be anxious to get on the phone and use what they learn.

Getting a "buy-in" involves **making it clear to the trainees what's in it for them**. Make it clear that when the company prospers through their excellent work, they will prosper. Explain the thrill of making something happen because they learned a new technique in communicating.

Tell them of the joy of achievement through learning excellent skills that they can use in every facet of their lives, not only in this job, but with their spouse, children or significant others.

If you, as the trainer, show you are excited about the training and you perceive its value, and can **convince the trainees it's going to benefit them**, your job will be a huge success.

Make the tele-sales agents feel you are there to help rather than criticize them.

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*Judy McKee is the founder and owner of **McKee Consulting LLC** , a Call Center Training Company. Located in Escondido, California. She can be reached at 760-738-8200 www.TrainYOURCallCenter.com*

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