

ARE YOU READY FOR A PERFORMANCE MANAGEMENT TOOL?

Performance management is a process first, which is enabled and reinforced by technology second.

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Are You Ready for a Performance Management Tool?

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How would your contact center rate its performance management? Have you brought the right combination of people, processes and technology together to identify and capitalize on opportunities for continuous improvement? If your center is like most, there is room for improvement in either process or technology—or both! A recent SHRM (Society for Human Resources Management) Foundation paper reports that less than 30% of those surveyed have an effective performance management system that establishes goals, provides feedback and improves performance. That's hardly encouraging news given the breakthroughs in tools and techniques to advance this discipline!

A center's size, complexity and operating environment will have a bearing on the performance management strategy and the technology used to enable it. With so many options available, it's important to consider what's "right" for your center.

Performance Management Defined

Performance management is a process first, supported by technology second. Its desired outcome is a disciplined approach to understanding a center's operations that enable it to meet goals and continuously improve. It balances input and insights from other tools such as your automatic call distributor (ACD), workforce management (WFM), quality monitoring (QM), customer satisfaction or voice of the customer (VoC) surveys, eLearning, and even things such as customer relationship management (CRM) and Net Promoter Scores (NPS). From these various sources, it provides analytics and dashboards/scorecards to identify opportunities for efficiency, effectiveness and positive financial impact.

Figure 1 shows the traditional approach to performance management as a linear process. Management establishes SMART (Specific, Measurable, Attainable, Realistic and Timely) goals appropriate for a department, team or individual's responsibilities and span of control. A combination of system-generated reports, other metrics and self-assessments provide data to measure progress. And nestled between goal setting and year-end review, there is at least one interim evaluation to determine whether or not course corrections are in order.

A linear process may meet the needs of a relatively static environment for which history is a good predictor of the future. However, it may not provide the agility needed to respond to changing expectations, environments or employee behaviors—which pretty much describes a typical contact center!

Even if the larger organization takes a linear approach, contact centers are more successful when they follow a more progressive process that integrates information from multiple facets of the operation and provides timely feedback at shorter intervals. Then the agent and supervisor can work together to improve the agent's performance and the contact center overall. It may look more like Figure 2.

The characteristics of a progressive performance management approach include:

- Focus on employee actions/behaviors and their effect on corporate key performance indicators (KPIs) and the customer.
- Real-time access to personal results with comparisons to targets, the team and the center.
- Iterative dialog between employees and supervisors to emphasize incremental behavior adjustments to enhance performance.
- Up-to-date dashboards and scorecards displaying actual results compared to goals, including employee access to coaching forms, best-practice tools, workflows, etc.

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The traditional and progressive processes are very different at their core. The progressive model has a heavy reliance on technology, and therefore, partnering and collaborating with IT to support a successful outcome.

Tools Enable Processes

Solid goals, metrics, processes and policies that support corporate and contact center objectives are critical to process adherence and success. Once these have been developed, a tool or set of tools to enable and reinforce those processes can then be selected. But keep in mind that a tool can be an impetus for change and can help to define best practices. It is common to develop and/or refine processes based on the capabilities of the new solution.

A “best practices” contact center may have a clear definition of performance excellence as well as the metrics to understand how it is performing, along with defined coaching processes and support functions. Many reports and systems enable the processes. In this instance, the business case focuses on the value of automation and compliance.

In other contact centers, processes may be inconsistent, infrequently applied and immature. The organization is growing and cannot maintain the status quo. They may pursue new tools in tandem with process improvements and the tool often becomes the catalyst for change and the business case includes the value of both changes.

Where would you place your contact center: Great processes and need better tools; lousy processes where a tool might help; or somewhere in between? Figure 3 shows the typical evolution of performance management tools.

Considerations When Seeking Performance Management Tools

When considering performance management tools, start with the requirements to meet your center’s strategic goals. A well-executed Excel workbook may meet the needs of one contact center, whereas a fully integrated web-based tool is required for another. Your IT partners can be great resources to help you consider options and the associated costs.

The following questions provide a starting point to identify which tool(s) suits your needs and some of the other changes that will need to accompany the technology pursuit:

- What are the gaps with the current tools?
- Do our current vendors offer appropriate solutions?
- Do our processes need to be better defined or reinforced?

Table 1: Key Performance Management Features

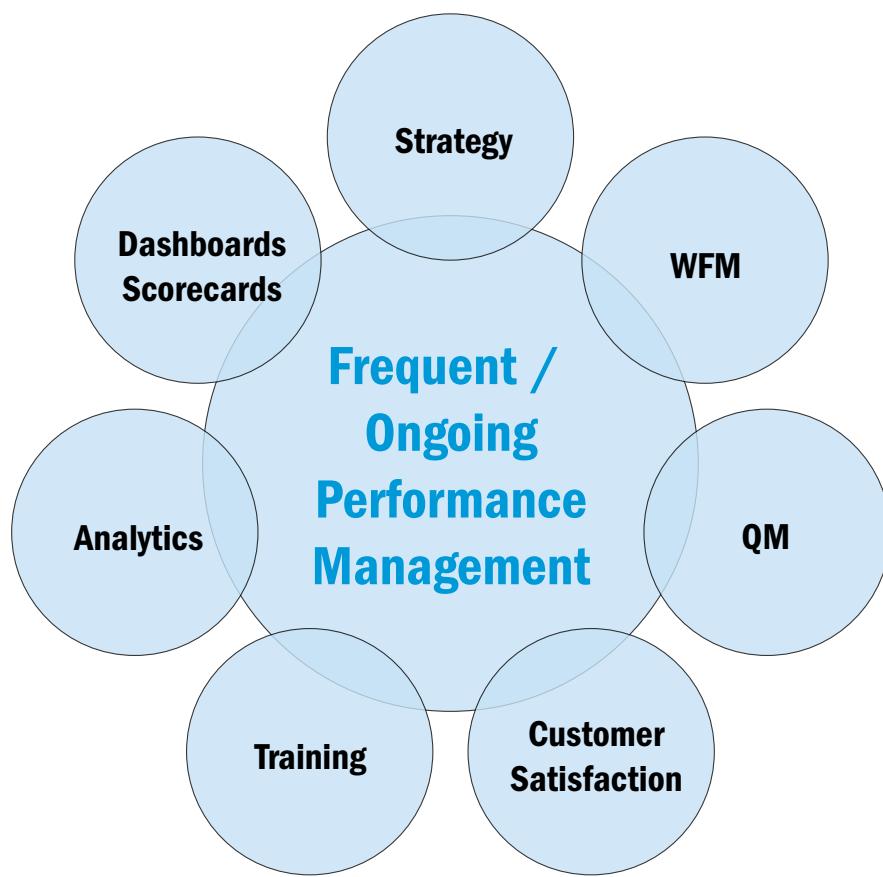
INPUTS/DATA FROM	ANALYTICS	OTHER FEATURES
► ACD	► Build dashboards for real-time feedback and scorecards for historical views	► Views for different roles
► WFM	► Compare actual to goal, peers and/or baseline	► Messaging to share outcomes
► QM	► Calculate and observe trends	► Recognition (peer and other)
► CRM	► Drill down or roll up to explore why	► Coaching coaches
► Policies and procedures	► Track adoption and usage	
► VoC	► Create reports	
► NPS		
► eLearning		

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Figure 1: Traditional Performance Management Approach



Figure 2: Progressive Performance Management Approach



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Figure 3: Spectrum of Performance Tools

BASIC	FOUNDATION	ADVANCED	BEST-IN-CLASS
<p>Basic tools (if any) for call recording and workforce planning; require significant manual activity</p> <p>Manual historical reports created by Supervisors/Managers</p> <p>Focus on voice only</p>	<p>QM and WFM for voice contacts</p> <p>Screen capture with voice recordings</p> <p>Some form of VoC</p> <p>Separate reporting tools for each media</p> <p>Limited scorecards used by all roles</p>	<p>Robust QM, WFM across media</p> <p>Integrated VoC across media</p> <p>Common reporting engine for all media</p> <p>Includes “cradle-to-grave” information to track contacts & outcomes</p> <p>Scorecards/ dashboards specific to roles and target metrics</p>	<p>Integrated performance optimization tools including reporting, WFM, QM, VoC, and analytics tied to training, coaching, and process optimization</p> <p>consolidate data and provide greater insight into meaning of data</p> <p>May use other analytics tools specific to contact types (e.g., speech, text)</p>

- Do we have our metrics well defined, or shall we work on KPIs?
- Does size and location(s) impact the priority and type of tools?
- Do we need real-time information in addition to historical views?
- What is the budget?
- Does frontline leadership need training to drive performance management (in addition to any process and tool changes)?
- What are other parts of the organization using for performance management?
- Do we have a defined project implementation process and resources available to support implementation?

Implementing a Performance Management Tool

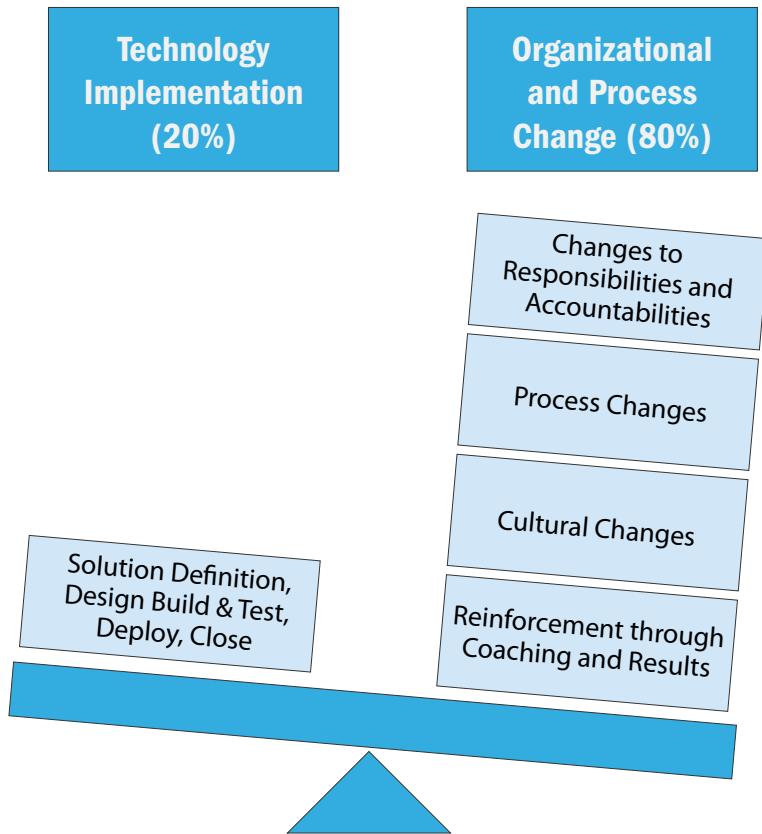
Vendors are happy to integrate your existing reports and build scorecards, dashboards and analytics tools for your center. Before you get caught up in their enthusiasm, let's review features in typical offerings as well as what to expect and what NOT to expect during a project implementation.

PERFORMANCE MANAGEMENT FEATURES

With your IT partners, review the most common features offered by performance management suites against your existing tools and your business requirements. Table 1, on page 3, provides

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Figure 4: It's Not Just About the Technology



a starter list.

Where are your gaps? What are the missed opportunities those gaps create? What's the potential pay-off for taking things up a notch? Assessing these items will help you to determine whether or not it makes sense to pursue new tools.

THE PROJECT

Whether you decide to bolster an internal solution or seek new technology, a strong project management process aligned with a change management methodology is crucial for a successful implementation. Other keys to success include:

- Strong IT and vendor support, from building requirements to testing and business preparedness
- A collaborative project team including IT, Operations, Testing and Support teams
- Iterative reviews between IT developers and the business (e.g., review prototypes of screenshots and functionality)
- Thorough testing that involves IT and the business users
- A solid training program that includes process changes in addition to the technology

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- Pilot teams to help find issues and optimization opportunities before full launch
- Strong communication at all levels, especially frontline agents and supervisors
- Resources that can be solely or significantly dedicated to the project
- Frontline staff participation as early as possible in the project
- Goals, metrics and ideas focused on user adoption

Technology creates the potential for transformation to a new and better state. The IT team and/or vendor can get the technology developed, tested and deployed on time. The more challenging tasks are the organizational and process changes that are required to achieve user acceptance. Creative communication, frequent updates and staff involvement all play a role in the adoption and use of new technology.

Figure 4 demonstrates the relationship between technology and processes when implementing new tools in the contact center. While the technology is exciting and appears large, it's the other side of the balance that holds the keys to success.

“Change Agents” Drive Use

In the end, if the performance management tool is not embraced, the project will not achieve its goals. Hold everyone accountable to utilizing the tools through KPIs as well as adoption reports. Improved performance reaps new rewards and encourages the open, transparent culture that most of us desire. With the right tool enabling the right processes, your performance management will end up highly rated! ☺

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