



## Go Ahead, Send the Invitation

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*National Association of Call Centers / Volume 8, Issue 5, May 3, 2013*

“If you always do what you’ve always done, you will always get what you’ve always got.” Henry Ford may have used these famous words to inspire his leadership team to step out of their comfort zones for the sake of improving results. Maybe it’s time to challenge ourselves to do something different.

Organizations spend a lot of time, energy, and money developing leadership skills to provide professional, objective feedback to staff to elevate performance. Oftentimes, we do not deploy those same skills at the department level. Your support teams (e.g., IT, HR) and in-house customers (e.g., Marketing, Product Management) can be powerful resources to provide 360-evaluations and basic observations.

Does soliciting feedback make you a little nervous? Dare to set those fears aside and be open to the process. The insights you’ll gain will be worth the effort. The following steps will help you get started.

### **Preparation**

An insider “field trip” creates the space for improving your operation while building awareness for the highs and lows of running a modern day customer contact center. Before you send your invitation:

- Define your goals. Help your guests understand the standards of excellence to which you aspire to give them a framework for their observations.
- Develop an agenda that includes introductions, a brief operational overview, agent shadowing, and time for follow up discussion.
- Inform your staff about the pending visit and objectives.
- Prepare the agent(s) for shadowing.
- Choose a date and time for the visit; remember, busy days might be the best days!

### **Invitation**

Get creative. Include your objective to challenge the status quo. Let them know you would appreciate another set of eyes to visit the center, observe, and provide thoughts and ideas. Be sure to include specific requests. For example:

- An IT/IS leader may focus on desktop use, applications, and speed
- A legal leader may help you focus on language for disclaimers
- A marketing or communications leader may help with the phrasing/scripting, or gain awareness of the impact of marketing initiatives on the interactions

### **The Visit**

When the big day comes, make sure you prepare your guest for a successful event. Provide a quick tour if they haven’t been to the center before. Point out support areas such as QA, WFM, and training. Talk about daily volumes and total number of staff. Show them your posted statistics and recognition boards. Provide a QA form as well as a list of desktop applications that the agent accesses. Review specific areas of interest (e.g., scripting flow, slow application, disclaimers used).



Have them shadow agents for 90 minutes or more. Ideally, your visitors will get to see different agents in action. Conduct a brief follow up discussion to capture thoughts and ideas while they are fresh. And don't forget to snap a picture of your visitors to include in an upcoming newsletter to reinforce the concept!

### ***Follow up and Thank You***

Document the observations and create an action plan. Prioritize action items that will improve quality, productivity, employee morale, and overall customer experience. Provide follow-up to your visitors on actions that your team has implemented and the corresponding results as well as actions you identified in the debrief that may now be on their "to do" list!

### ***Make "Being Different" Routine***

Consistent feedback for individual contributors is a proven methodology to improve performance. The same holds true for developing strong departmental relationships. Don't let the interchange of valuable feedback turn into a one-time event. Invite departments (IT/IS, Marketing, Sales, etc.) on a frequent (e.g., quarterly) basis. You will demonstrate to your team and your company that you are open and receptive to ideas and encourage continuous process improvement.