When you don't know, ask! Or better yet…survey!

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Surveying sounds so simple, yet a lot of contact centers neglect to ask their customers and employees what they could do better. Management may *think* they know the service challenges they face because a few vocal employees visited their offices or customers called to complain. But this limited sample doesn't validate or quantify a problem or ensure that you have identified and prioritized all issues. Today's cloud-based survey tools (e.g., Survey Monkey, cVent) are so inexpensive and easy to use, even the smallest center can collect valuable data from which fact-based decisions can be made.

Surveys can quickly provide feedback on agent knowledge, professionalism, First Contact Resolution (FCR), and overall customer satisfaction (cSat). For example, Voice of the Customer surveys identify themes for system or process continuous improvement initiatives and key areas for individual or team training on policies or product knowledge. The same tool can survey employee satisfaction (eSat) or help you discover the root cause of process breakdowns within a contact center or between the center and internal departments such as IT, field teams, or fulfillment. Agent surveys can raise management awareness of change management needs or identify opportunities to improve morale by shifting priorities on process improvement or technology initiatives.

Consider four recent examples from client projects to get your juices flowing:

- In a rapidly growing on-line retail environment, a survey focusing on roles and responsibilities between staff helped clarify for management organizational changes for greater center efficiency and accountability.
- A multi-state organization wanted to establish a centralized call center. They surveyed the retail location management across the states to identify and quantify needs and roles prior to establishing the new center.
- A large center struggled with consistency and accuracy in information provided to callers. They surveyed agents to understand their reasons for not using the organization's Knowledge Management (KM) tool, and then launched an initiative to update and reorganize center-specific content for easier use and greater agent confidence in information accuracy.
- A company wanted to get perspectives across the organization of how IT was meeting needs in planning, implementation, and support. A quick survey helped identify priorities for change and set a baseline to measure improvements over time.

Anonymous surveys enable employees to provide frank feedback without fear they are jeopardizing their job. You can administer surveys through third parties to address any lingering concerns. In addition to statistical data, you can receive unsolicited comments that may open your eyes to issues of which you were unaware, or secure anecdotal input to support the case for new initiatives. My personal favorite benefit: Surveys provide a first step in the change management process by raising staff awareness and engagement in pending efficiency and effectiveness initiatives.

If you're ready to dive in, here are a few best practices to help you make the most of this valuable tool:

Internal Employee or Initiative Focused Surveys	External Customer Feedback Focused Surveys
• **Provide assurances of privacy** for all employees involved • **Explain what you will do** with the information and why their input is valuable • **Consider level of effort** as you balance respecting agent time and your need for detailed data • **Provide timely feedback** to agents regarding survey findings and planned actions • **Share feedback themes** (e.g., efficiency, effectiveness, customer experience) with all participants and impacted areas	• **Avoid survey bias** by sending surveys direct from your center or via a 3rd party • **Explain what you will do** with the information and why their input is valuable • **Minimize level of effort** by using a simple survey scale and limiting response time to 2-3 minutes or less • **Provide timely feedback** to agents and supervisors • **Share feedback themes** with impacted areas to support continuous improvement, focusing on the center's role in the customer experience • **Calibrate** Quality Monitoring (QM) questions and scoring to aligned with VoC questions