



2018 Credit Union Contact Center Survey

Hiring, Coaching and Development, and Retention

Q1 2018



Introduction

Strategic Contact facilitated surveys on Credit Union Contact Center best practices in 2016 and 2017 (if you don't have the latest results, click [here](#)).

In 2018, we are conducting "bite-sized" surveys to enable us to dive deeper into specific questions credit union contact center leaders have about how centers operate and use technology.

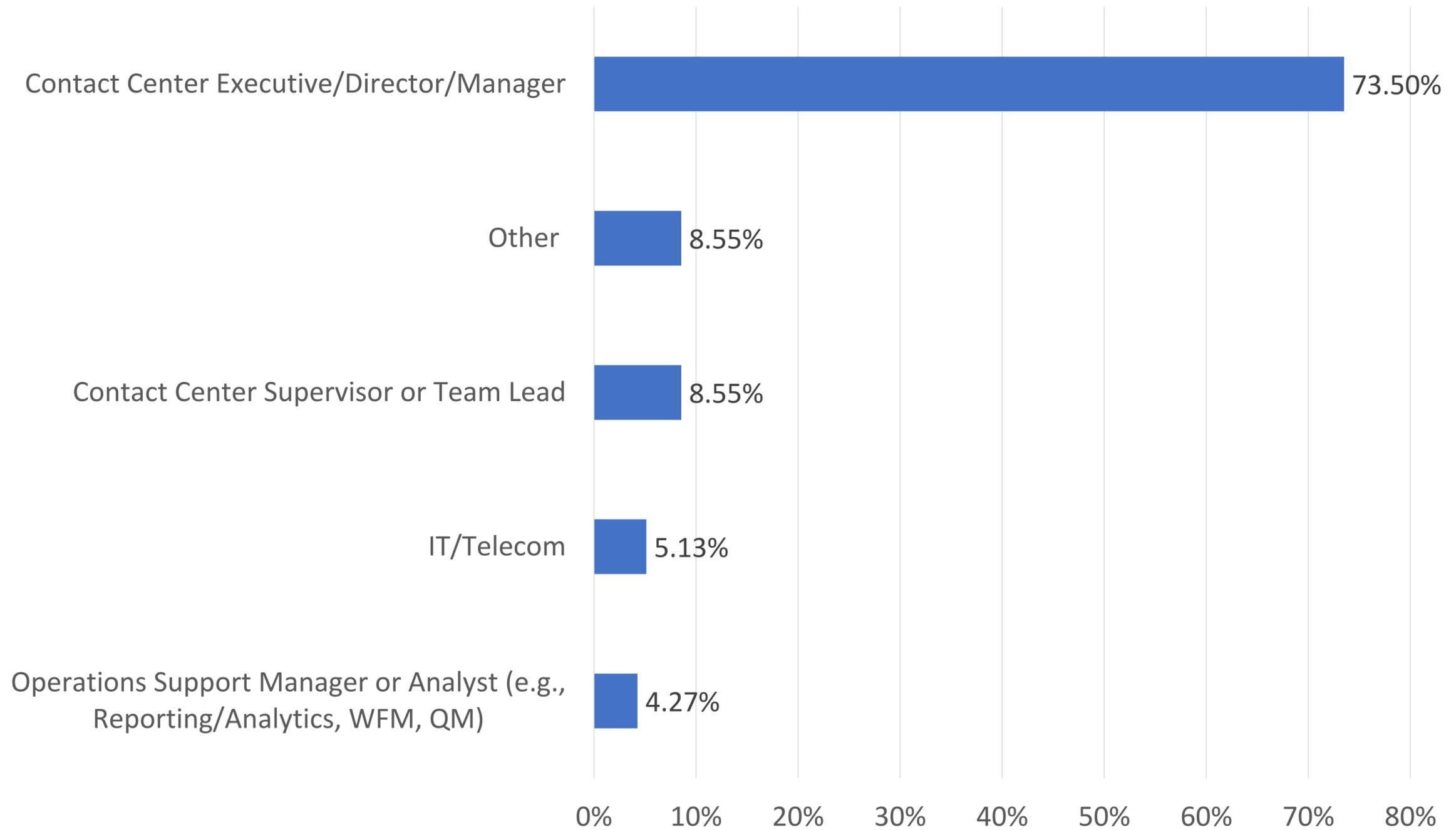
This document shares the results from the Q1 2018 survey focused on hiring, coaching and development, and retention.



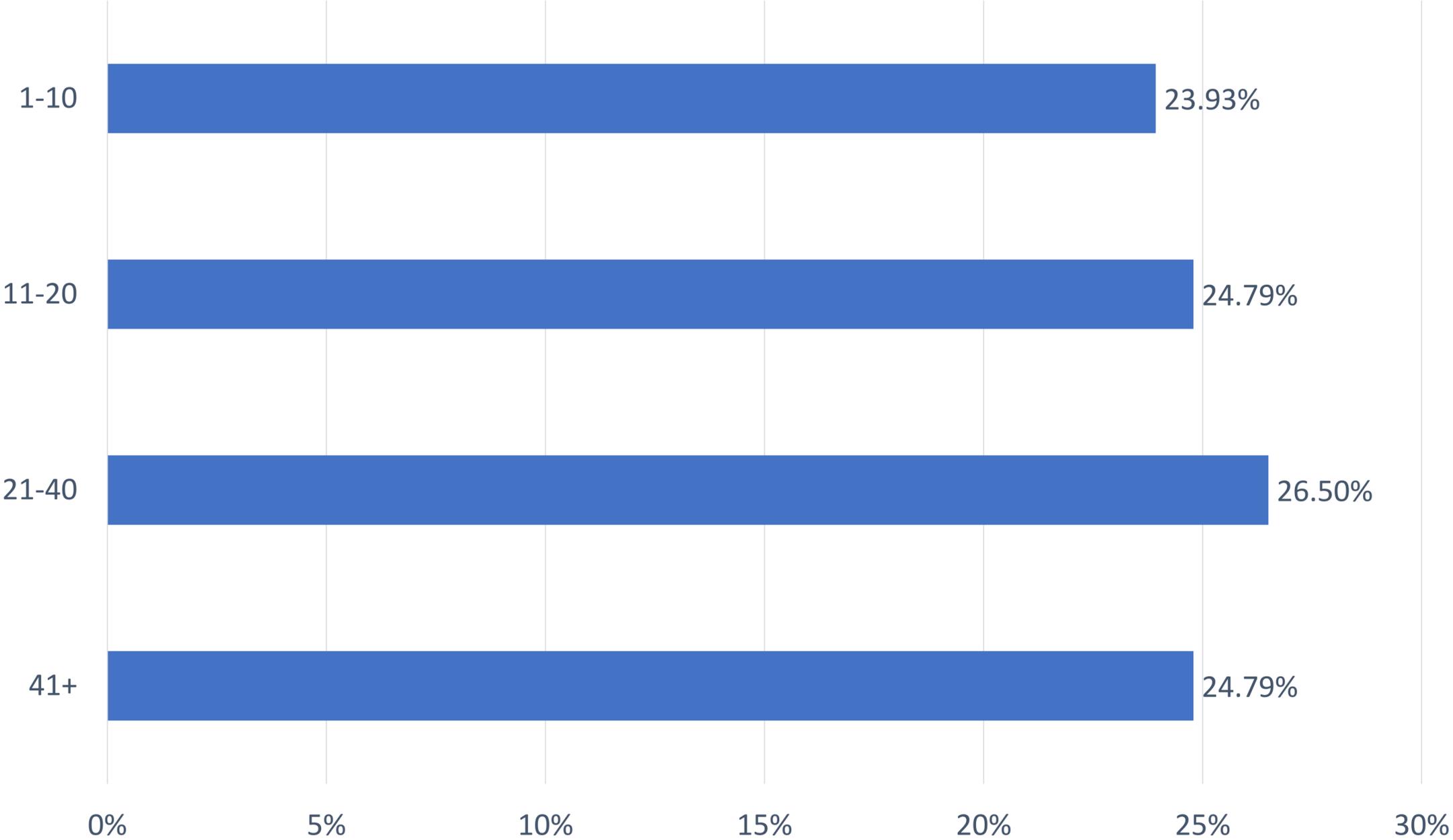
Insights

We share some of our insights based on the data and our experience working with credit union contact centers

Participant Role



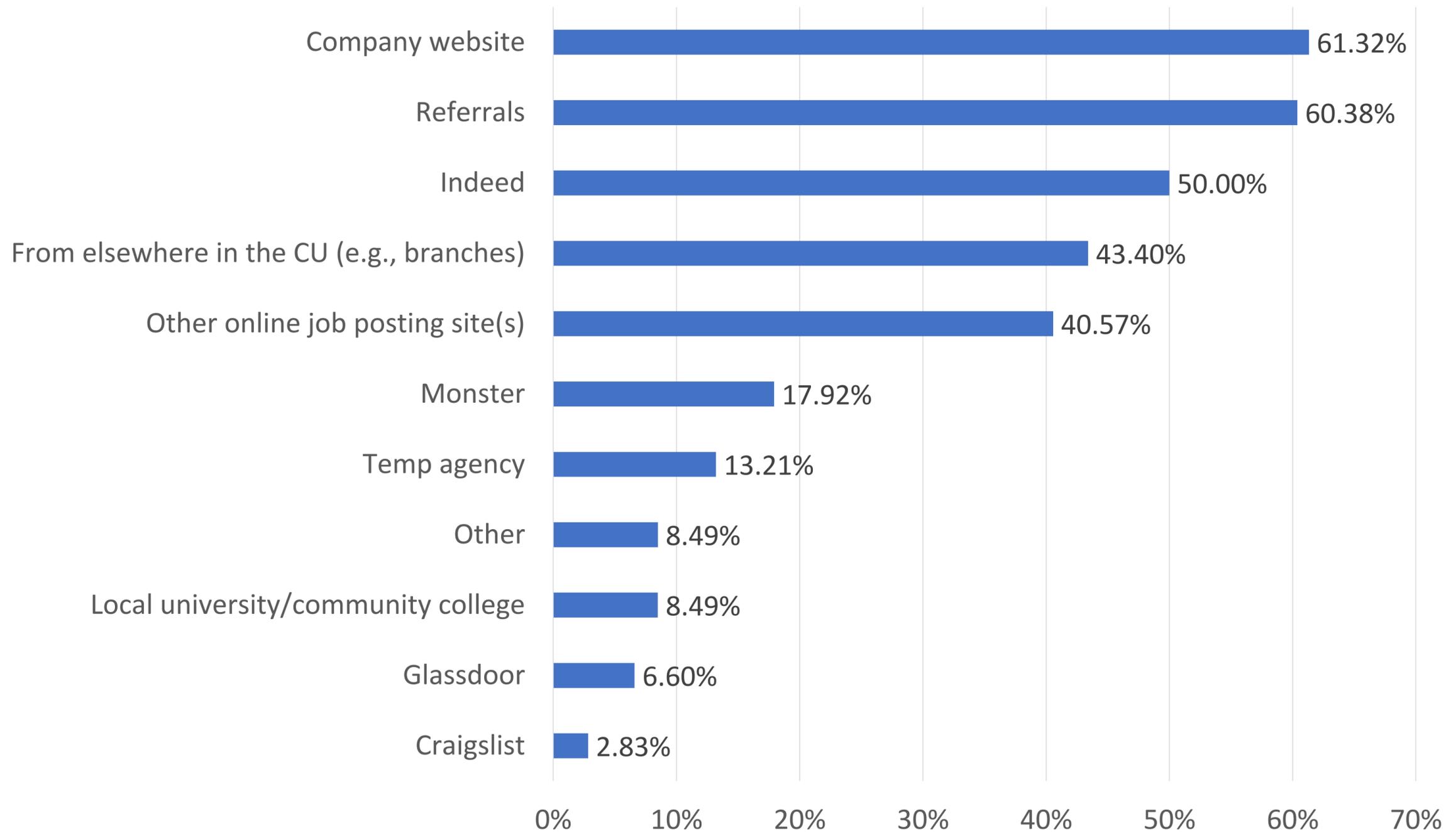
Number of Full Time Equivalent (FTE) Agents



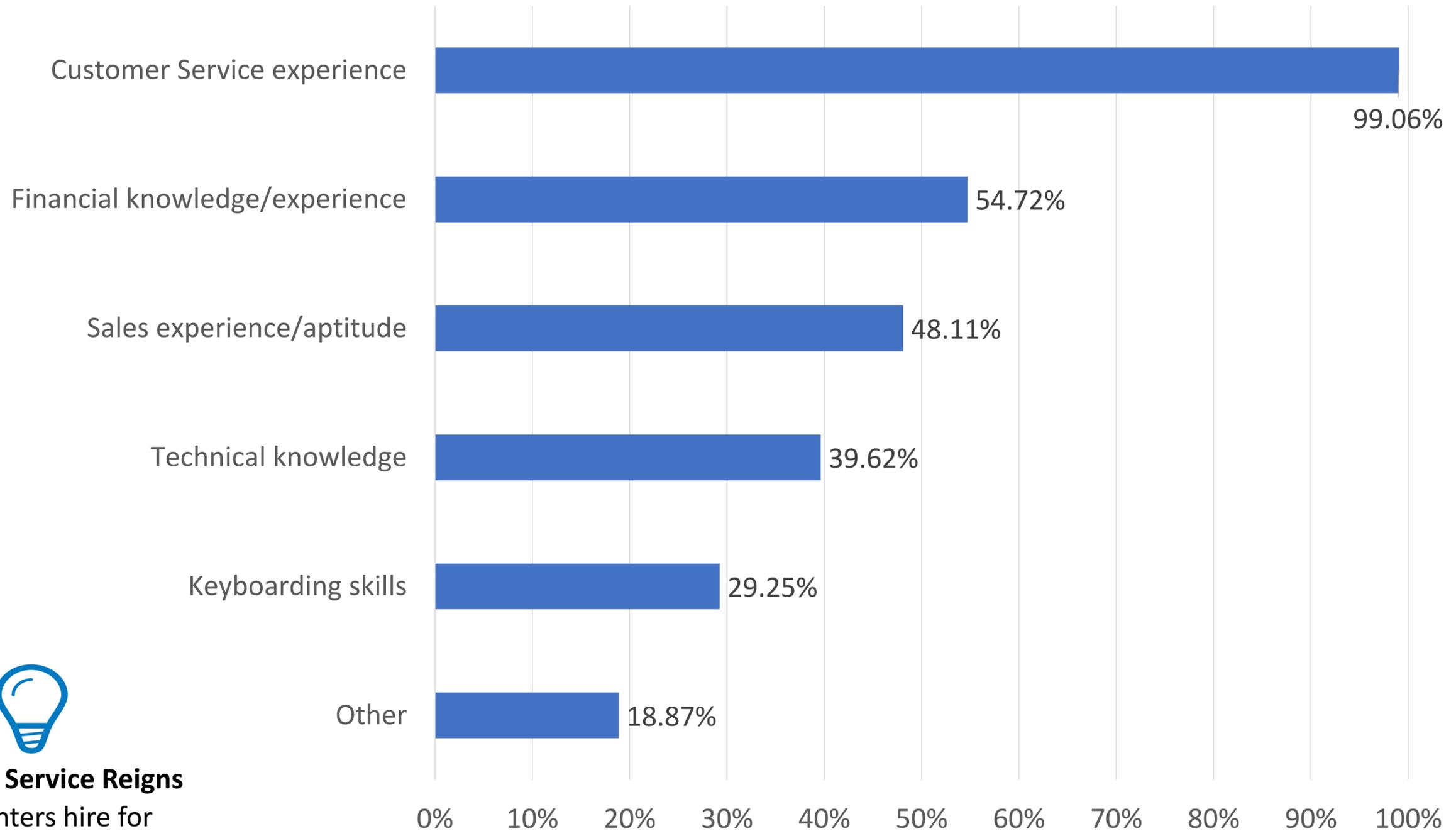
Size Matters

We looked at variations by size and found few – but we comment on those that stood out!

Sources for Finding Candidates



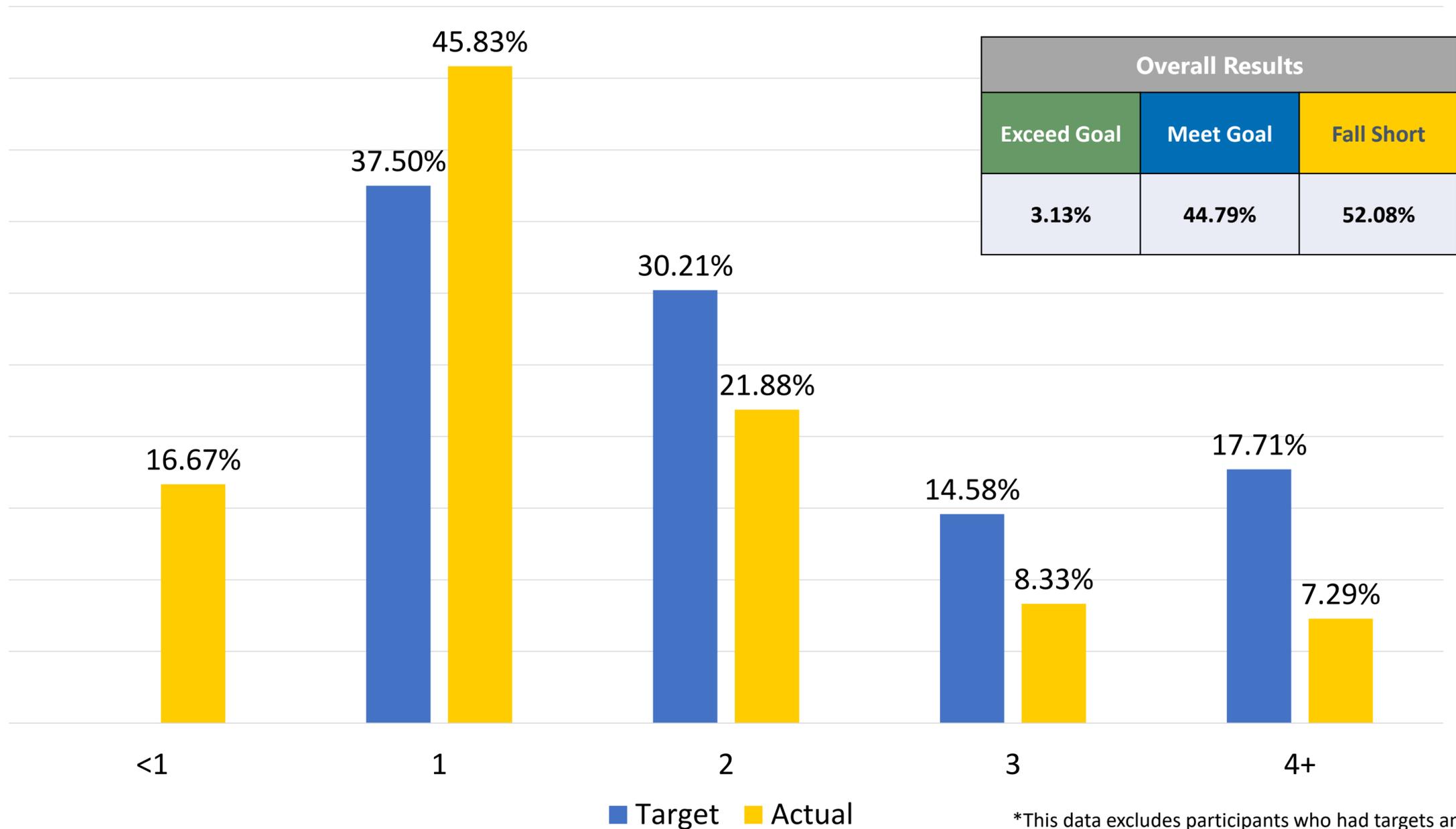
Skills Desired in New Agents



Customer Service Reigns

And centers hire for attitude and personality, with a belief that the other things can be taught.

Coaching Sessions Per Agent, Per Month

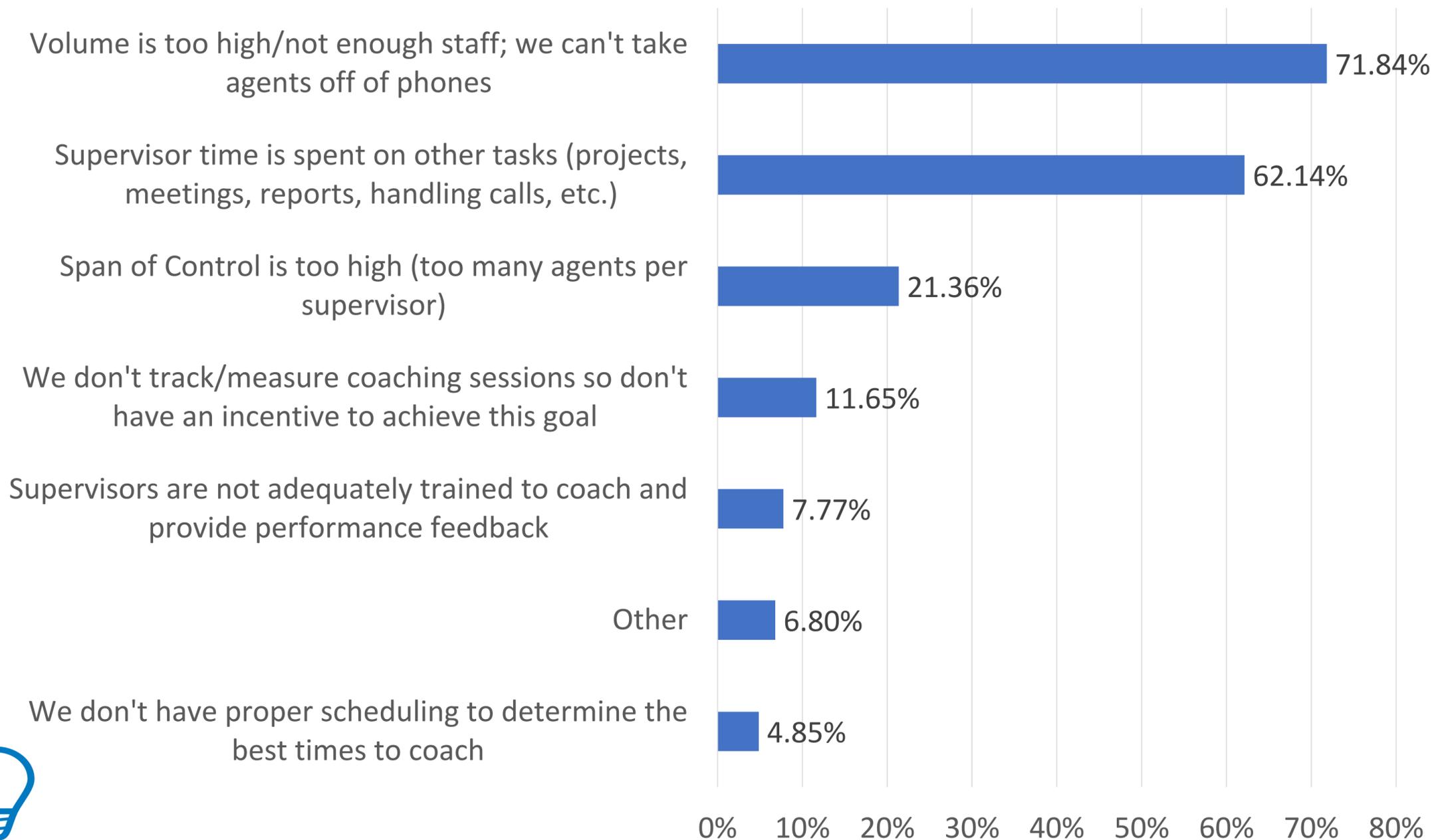


~ Half Meet Coaching Goals

Too often centers fall short of meeting their coaching goals, but those targeted 1/month tend to meet their goal (81%); those with higher targets rarely succeed (28%).

*This data excludes participants who had targets and actuals of 0 (7% of participants are doing no coaching)

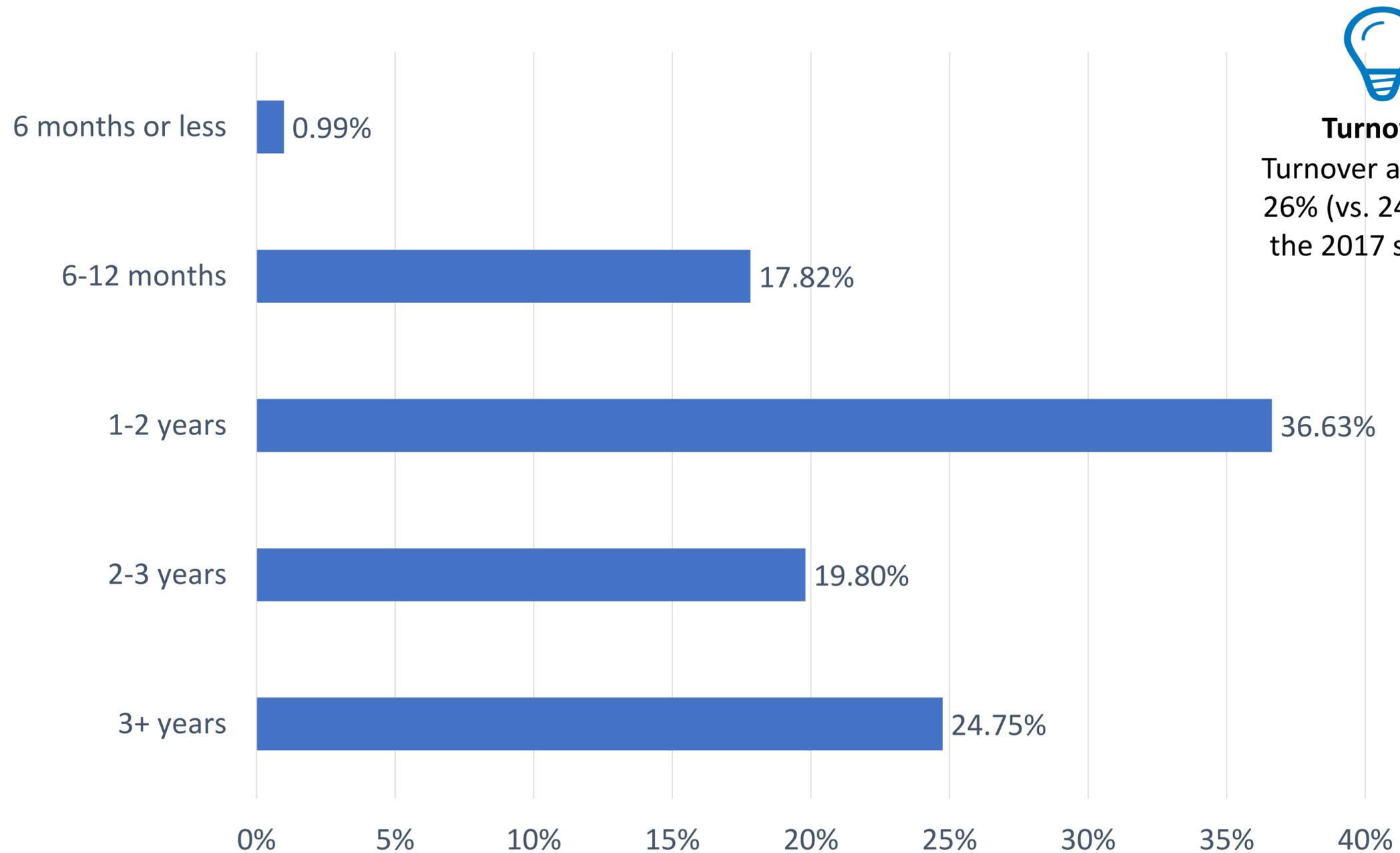
Items Preventing More Successful Coaching



Meeting Coaching Goals

Lack of time (Supers and Agents) is the thorn in the side of the coaching goals. Coaching must be planned for and prioritized.

Average Agent Tenure

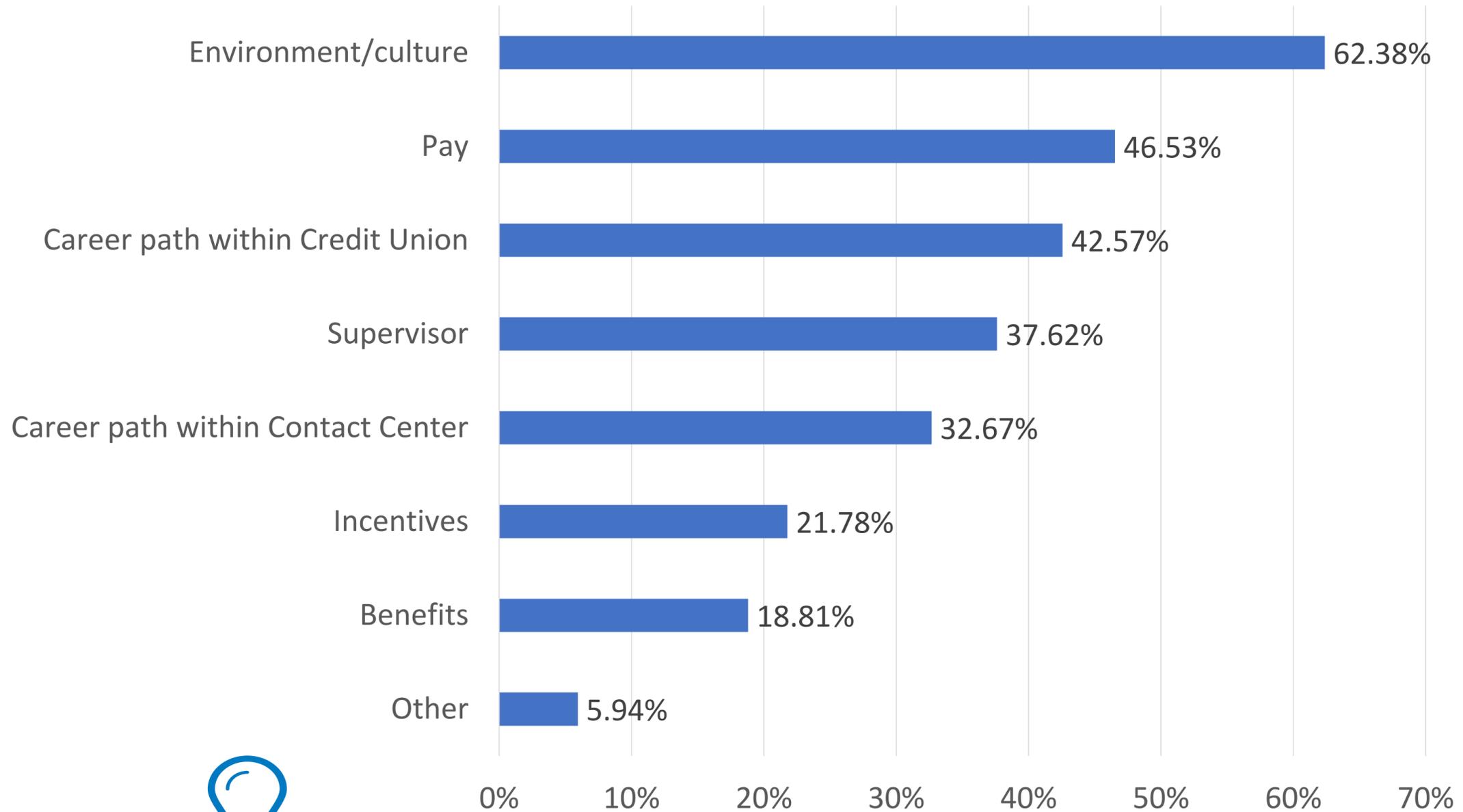


Turnover

Turnover averaged 26% (vs. 24% from the 2017 survey).

Data on turnover elements – advancing in the CU, voluntary, and involuntary terminations – was not adequate to analyze

Factors Impacting Agent Retention



The Big and Small of Retention

The *bigger* the center, the more CU career path impacts retention. Correspondingly, the average agent tenure is lower.

The *smallest* centers see the supervisor playing a stronger role in retention. Career path in the center holds much less weight.

Thank You

A big “thank you” to those who participated in this survey.

We will continue to dive into topics of interest.

We hope you will participate and keep the learning going!

Learn more about [Strategic Contact](#) and our work with credit unions.

We would like to thank Adapt and SilverCloud for their assistance in engaging credit union participation.

