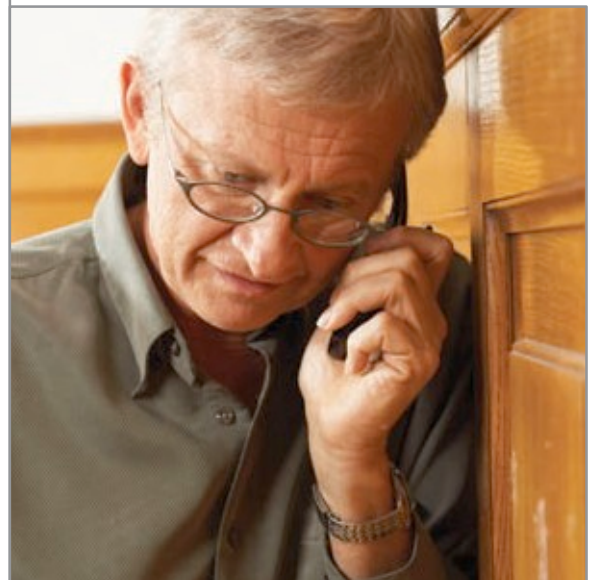


Rushed, Routine, and Robotic

Contact Center Directors: Be Careful What You Ask For

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Contact Center Directors: Be Careful What You Ask For

My family has an annual rite, an event of utmost seriousness to my elderly father and tolerated accordingly by the rest of us. It is a day-long harvest and freezing of beans from my parents' vegetable garden. One year, while my mother was sealing the beans into little freezer bags, she noticed that some bags were marked "sandwich bags" and others were marked "freezer bags." My father was taking no chances with his precious harvest. He found a toll-free number on the box and started to call. I was then a bank contact center director and begged him not to. "It's a contact center, Dad, not the factory. It's Saturday, they won't know, they don't care."

He ignored me, called, and reached someone to whom he worriedly explained the whole bean situation. I was cringing, imagining the person at the other end rolling her eyes, smothering her laughter, waving over others to listen in. But Dad was listening carefully, nodding, agreeing. He reached for the bags, rolled them between his fingers, held them to the light, answering questions. Apparently satisfied, he offered his thanks, hung up, and proudly explained how the contact center lady had helped him decide that all the bags were suitable for his beans.

I have never forgotten that event. This was little bags and beans—just a small customer with an odd question about a single box of bags. That contact center representative had no script for anything remotely like the need my Dad presented. But she didn't need one. She treated my Dad with respect, patience, and compassion, and she gave him thoughtful advice. I don't know what kinds of calls she usually got on Saturday at the bag company, but she didn't let her expectations or scripting keep her from being authentic, personal, and helpful.

Why was I so surprised? Why is that so rare? If the lady at the plastic bag contact center could do it, why isn't that the ordinary contact center experience?

The fault lies not with the contact center representatives. A former contact center director myself, I believe that most reps labor valiantly under a double-faceted system where "customer service" is the stated ideal, but "hurry up" is the real expectation. Where "understanding customer need" gets lip service, but training consists of "say this, say that." Where "customer engagement" is expected to occur magically under working conditions that doom it from the first hello.

Customers seem to think so, too. According to the National Association of Call Centers, a study commissioned by the UK government found that "call centers managed to make number four in the list of things that irritate people most in their daily lives." A Genesys study found that "40 percent of consumers have stopped doing business with a company solely due to a poor call center experience."

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Rushed, routine, and robotic. The unfortunate three Rs of too many contact center interactions.

“Press one to be patronized, marque dos to be ignored.”

Even if we are no longer shocked by such findings, it is time we were disturbed. Financial institutions have invested millions in customer service and contact centers over many years. It is no longer a new channel. Desperate to fight off competition from all sides, companies should be demanding better results from their contact centers today. A few are, and they are seeing better results. But the rest should see this awful reputation for contact center service as a blight on the profession and a personal challenge for righting it in their own centers.

Contact Center Idealism

Full disclosure: I am a contact center idealist.

I truly believe that a contact center rep can make someone's day by deftly handling a simple balance inquiry. I believe that good contact center directors ask their reps every day, “Did you make a difference for our customers today?” And they ask themselves, “Did I make a difference for my reps today?”

And if the answer is yes to both, they can all conclude with pride, “We made a difference for the company today.”

There is experience behind my idealism. I have had the marvelous fortune to direct contact centers for companies which shared those ideals, and I now consult to other companies which do the same. I know that it is possible to have contact centers that actually thrill customers, fulfill employees' desire to make a valuable contribution, and bring in a lot of revenue.

But there is realism in my idealism. When my line of work comes up in a social setting, I steel myself against a bitter chorus: *All they do is read from a script. You can tell they just want to get you off the phone fast. They don't care—I'm just a transaction to them.*

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In those social settings, people tend to blame the reps. Not I. “Remember,” one expert says, “contact center representatives don't quit because they are devoid of basic skill requirements; they quit because they don't like their jobs.” They don't like the reputation, they don't like what they do to cause that reputation, and they feel powerless to change it.

Edward G. Brown¹ nailed the plight of the average contact center rep: “Not just stressed, but **distressed**. At the mercy of every furious customer and lonely heart with a telephone, harassed by the ticking clock and the time-obsessed manager, frantic to find the right answer, use the right script, hit the right keys, and desperate to hit their numbers and earn their meager incentives. Is it any wonder that contact center turnover is so high—a margin-busting 25% on average and ranging as high as 80%?”

¹ Founder and Co-Chairman of Cohen Brown Management Group and developer of the Call Center Relationship Management Labs



I blame whoever is responsible for sustaining the double-faceted environment. Those who keep asking for one thing (service) but really want another (cost savings). By doing so, they create four insurmountable obstacles for their reps:

- They depersonalize what should be personal.
- They emphasize numbers that measure everything except service.
- They overscript interactions that beg for authenticity.
- And they invoke customer satisfaction without conviction.

Depersonalizing Service

Any large organization, even the most customer-focused, is vulnerable to processes that depersonalize relationships. Consider the language. Contact centers are massive “units,” handling millions of “transactions” each day, created to “offload” customer “traffic” from the branch, charged with handling their “volumes” efficiently. All that is true, and in such an environment, customer calls can be like batches of checks to be run through the reader/sorter or truckloads of cash to be counted and vaulted.

But this is equally true: All contact center representatives have to do, day in and day out, is help one customer at a time with that customer’s need. From that perspective, it is an entirely personal interaction. Maintaining that one-person-at-a-time, real-time perspective, rather than a batch-processing perspective, produces a very different experience.

A large insurance company recently invited us to discuss how we could help them improve their contact center performance. They were eloquent about their challenges: productivity pressure, rapid turnover of reps, too many screens, too many calls, declining service scores, and so on. The batch-processing language was flying—and the customer-service basics were flying out the window.

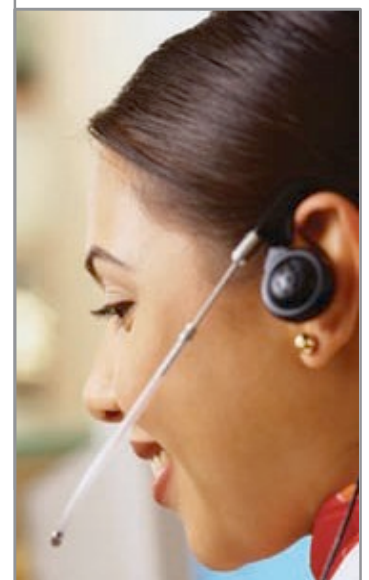
So I proposed a re-set: “Let’s talk about your vision. You have an awesome responsibility. What could be more important to the people who call you than what you are insuring for them: their lives and their homes? Would it be fair to say that you want to be ‘the stewards of peace of mind’ for your policyholders?”

At first, they looked at me as though I had three heads. I persisted: “Your callers have entrusted you with the most important things in their lives, and when they call you, you are in such a powerful position. Each caller is not a call, but a person who is asking you for help.”

By the end of the meeting, we were having an entirely different conversation. We were talking about callers, not calls. Satisfying needs, not call times. Rep tone, not product facts. Rep satisfaction, not scripts.

Technology is often the culprit in leaching the personal touch out of rep–customer interactions. I recently sat down with a contact center rep at a large North American

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bank. I was interested in hearing how she fielded some fairly straightforward questions from customers. I was amazed to see she had 24 systems open on her computer!

No doubt there was a technology reason for that. No doubt all the decisions that led up to that overwhelming distraction were based on how the technology could serve the customer better. Indeed the rep's access to all that information enabled her to answer all the customers' questions accurately. But you can imagine, and I could hear, how the rep had to put all her concentration into working the systems instead of creating a connection with the customer. Nowhere in the interaction did she have the opportunity to sound like a person talking to another person who needed her help.

Questions for Contact Center Managers:

- *In meetings with your reps, do you talk about happy customers or just statistics?*
- *Does your training talk about calls or callers?*
- *How many systems do your reps have to open to take care of an ordinary customer call?*
- *What have they been trained to say to customers while they move from system to system?*

Painting by Numbers

When I prepare to visit big contact centers, I let my hosts know what I would like to see, hear, and do. Tour the facilities. Explore the floor. Sit with a rep on a complex call. Observe the technology myself to see how intuitively navigable or intrusively demanding it is. Sit in on a meeting about customer service. Audit a coaching session.

I do my best to make it clear that the “intangibles” are highest on my list. But most of the time, what is highest on management's list is “the numbers.” I am usually handed a substantial packet of performance reports on dozens of different cuts at their productivity measures: average speed of answer, abandons, blockage, longest delay in queue, rep occupancy, shrinkage, schedule efficiency, average handling time, after-call work, and so on—the nuts and bolts of contact center efficiency.

If the numbers are good, it is clear I am to be congratulatory. If the numbers are bad, it is clear I am to offer solutions. In either case, I am bound to disappoint.

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Callers call with an emotion and a need. They are worried about a deposit, and they need to know their balance. They are excited about a purchase, and they need to know if they can buy it. They are confused about a fee, and they need to know why it appeared.



When callers hang up, are they relieved, satisfied, mollified? Do they feel better about dealing with that contact center (and that company) or worse?

The answers to those questions are not impossible to quantify, but they are harder to quantify than wait times, call times, and all the other statistics that mean a lot less in terms of the contact center's reason for being—serving customers.

Not to be disingenuous: I know why directors keep numbers like that. When I directed contact centers, I did the same. Efficiency is not irrelevant, and companies do need to track staffing levels, technology deployments, and productivity. But as a starting place for contact center improvement, the usual packet of numbers no more defines the performance or potential of that particular contact center than a Water Lilies paint-by-numbers kit defines Monet's genius.

Questions for Contact Center Managers:

- *Is your measure for customer satisfaction about the clock or about the customer?*
- *When you walk the floor, is your demeanor studious or impatient?*
- *Are reps' spaces personalized, neat, and professional looking or bare and interchangeable?*
- *When you coach them (you DO coach them, right?), do you ask about numbers or do you ask why a call was or was not a good conversation?*

Overscripting the Interaction

The American actor, Spencer Tracy, when asked what he looked for in a script, replied, "Days off." Too many contact center scripts seem to convey that same kind of disinterest in the real purpose of a script—to give the rep the information, confidence, and ability to practice a good call.

A recent trend is heartening. Technology Business Research, Inc. analyst John Spooner, describing Dell's attempts to restore contact center service levels, said: "In the last year or so, they've worked to reverse the trend by beefing up the tech support and shortening times that people are on the phone by *letting staffers go off-script with more knowledgeable customers.*"

But overscripting remains the most common caller complaints after long holds and poor telephony. Robotic-sounding reps who do not use "real" language, who only repeat their lines when the caller asks for clarification, and who do not put their answers into words the customer uses. Reps who use scripts that clearly do not fit the situation but seem designed to get the caller to give up.

When I hear that, I am fairly certain they have been handed a script and told to learn it. Worse, I am fairly certain they were not given a chance to practice with other reps or their own managers. They end up "practicing" on their customers.

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And who knows who wrote the script? I have seen scripts handed straight from marketing to the contact center—no collaboration. Or straight from compliance, or the business head. “Here is the script, memorize it. Oh, and sound authentic and satisfy your customers.”

I have worked with contact center directors who resist sending their reps to scripting clinics. They deliberately choose not to learn what a rep *would* say in such and such a situation. They evidently do not know that scripting clinics are where reps gain learning and confidence so that they can in turn take care of customer needs. That is where they learn to be fluid, to keep control of the call when the customer does this or that, to mirror the customer’s tone, to acknowledge the customer’s emotion. That is where they come to understand what the script conveys well enough to go off script if that is what is required to have a “personal” conversation with the caller.

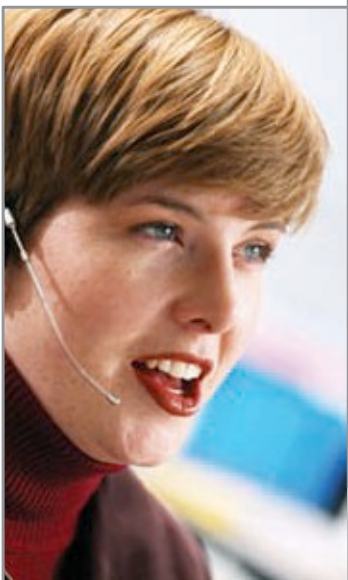
If managers do not trust their reps to contribute to the script, how can they expect the script to be delivered with confidence and energy? Is there a better recipe for a robotic, bored delivery?

Overscripting reps has another insidious effect on them. It sets reps’ expectations about the calls they will receive and, therefore, about the callers who make them. It limits the demands they make on themselves. “If this is what we are supposed to say—this and nothing else—then it is not fair for us to be challenged with situations where this doesn’t serve.” They have a point. If a bookstore owner teaches employees how to ring up book sales and that is all, and a customer comes in and asks for a book recommendation, the employee probably can’t rise to the occasion.

But if employees collaborate on their scripts, are taught how to use them to have appropriate conversations with callers, and get a chance to practice with each other before they go live, they expect to adapt to whatever takes place on the call. They can recommend books if asked to. They rise to the occasion like empowered, proud employees.

Questions for Contact Center Managers:

- *Do you hand over scripts or do you hold collaborative scripting clinics?*
- *Have you yourself been trained in holding scripting clinics?*
- *Do your reps practice on your customers, or do you provide for internal practice?*
- *Are your reps permitted to go off-script?*
- *If so, do you know how they will perform?*
- *Do you trust your reps to script their own calls?*
- *When you call your contact center, how does the rep sound—like a person or a talking brochure?*



Invoking Customer Satisfaction without Conviction

The contact center is so powerful. It can make or ruin a customer's day. It can cement a relationship or end one. So it is perplexing to me that many contact center directors remain complicit in one of the more specious truisms about customer service. I am referring, of course, to the persistent practice of reporting "customer satisfaction" in terms of how quickly calls get answered. That is like awarding the Pulitzer Prize to the fastest writer.

No one seriously believes that contact centers with the shortest answer times are giving the best service. They may win the cost-cutting race, but the correlation with satisfied customers is tenuous and primitive. (And what a meager measure, if financial peace of mind is the mission!)

It is time to own up. Wait times became the standard proxy for customer satisfaction because contact centers were not really supposed to take great care of customers—they were supposed to save money. Okay. They do save companies millions. For banks, they are often the "biggest branch," operating at about 25% of the branch system's costs.

But today, for good reason, the mantra is service. Virtually every CEO acknowledges that unless the company is differentiated by great service, a company cannot compete successfully. Today's measures must properly reflect what customers mean by customer satisfaction.

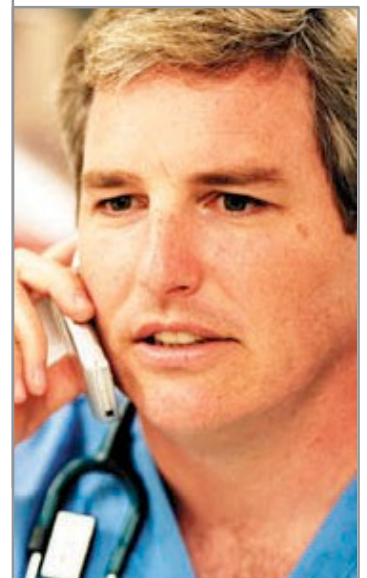
One contact center director told me enthusiastically, "Just tell me the numbers I have to hit to be world-class in customer service." I answered honestly. "You could make just about any number work. But what is the sacrifice you are making? There is always a trade-off."

Another director turned around a bank contact center to become one of the best rated in terms of customer service *and* was delivering a high percentage of the retail bank's revenue. One of the director's first tactics had been to take the time monitors out of the contact center so that only managers and supervisors monitored call time, while the reps focused on service. Enter their boss, who had learned what he knew about contact centers from a productivity-obsessed organization. He quickly noted on the monitor, "I see you have a few reps waiting for calls—you must be overstaffed." He also noted and questioned certain calls that were over the average call length.

I don't care how confident the director was of the contact center's amazing sales *and* service achievements—the boss's productivity fixation created pressure.

I once became director of a contact center where I was told my main challenge would be stemming high turnover. It was easy to diagnose the cause. Good service was defined largely in terms of speed, so reps were rewarded by how many calls they handled. Starting pay was poor but the incentives were sizable for those who could take twenty or more calls in one hour. To make decent money, reps were skipping the courteous wrap-up on calls, the after-work, and even bathroom breaks. It was a sweat shop.

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That is a perfect educational opportunity for reps who do not see themselves as mere transactors or bored answerers of tedious questions, but as the source of financial peace of mind for uncertain seniors during a high-anxiety period.

There was burnout from the pace, certainly, but there was also burnout from the falseness of the reps' task. They were told speed was good service, and they were paid that way, but they knew better. Who wants to work for a company that pays people to treat customers poorly?

Yet the International Customer Management Institute reports, "According to a survey on performance metrics conducted by ICMI, nearly half (45.6%) of contact centers do not measure rep satisfaction."

The good news, according to *The Economist* (July 26, 2007): "Jean-Hervé Jenn of Convergys, a provider of back-office services, points to a shift in call-centre outsourcing contracts away from quantitative metrics, such as the duration of calls, towards more qualitative measures based on customer satisfaction."

In financial services, one of the most common contact center service situations is the balance inquiry: "What is the balance in my checking account?" What could be more conducive to rushed, routine, and robotic? Surely there are no opportunities to demonstrate superior customer service in that small question—no opening to consultatively address the caller's needs?

On the contrary, it is the routine transactions where reps can most easily create a connection with the caller without sacrificing productivity. Reps untrained on real satisfaction will sit silently while the system brings up the balance, tell the caller the number, say you're welcome to the caller's thank-you, and take another call.

Those well-trained in satisfaction, however, will maintain a warm, interested tone that conveys, "I am here to help you." Asking, "How can I help you?" in a neutral or bored tone belies the words. While the system brings up the balance they will ask in the same personal tone, "While I am getting that information for you, may I ask, is there a particular transaction you are concerned about?" Assuming there is (and there almost always is), and the caller describes the transaction, the rep can answer in full, not just conveying the balance but solving the entire concern that prompted the customer's call, e.g., "Yes, that check has cleared, and it is reflected in the balance that I am about to give you."

The monthly "Social Security day" is likewise a huge service opportunity that tends instead to become one of the worst examples of "rushed, routine, and robotic." The lines are flooded with calls from senior citizens worried about whether they can make a certain purchase. There is an attitude of, "Here we go, it's the end of the month, the same old calls from the same old people who are too stubborn to go online and get the information themselves."

The customer may ask, "What is my balance?" but the subtext is, "I'm never sure when my Social Security deposit shows up in my account. I never know for sure when I can make my payments and purchases." That is a perfect educational opportunity for reps who do not see themselves as mere transactors or bored answerers of tedious questions, but as the source of financial peace of mind for uncertain seniors during a high-anxiety period.



“While I am looking up your balance, may I explain how Social Security deposits work? As you know, Social Security deposits are made on the last day of the month, but if that day falls on Saturday or Sunday, then they make the deposit early—on the Friday preceding. So you never have to worry about it being later than the last day of the month.”

In other words, “This is how we work for you!” That is not only great information, it is evidence of caring. It addresses the customer’s real concern, going beyond the question.

In another ordinary occasion with great service potential, I urge clients to really think about what they are saying to customers. “Your balance is \$150,000.” Think about that. It is because of customers like that who carry large balances that you have this job. Convey your understanding of that. Say the number that way, and add, “Thank you for being such a substantial customer. I want to make sure we are doing a good job for you. Is there anything else I can do for you at this time?” Customers know when they are good customers. They are accustomed to being recognized and treated as such at the drycleaner or bookstore. Why not at the bank?

Even with a loan balance inquiry, there is the opportunity to ask, “Is there a payment you would like to verify?” If reps don’t ask, they don’t get information. They don’t convey caring. They become the transactor. Contact centers are not like retail stores or the branches, where customers are more likely to volunteer information and have a conversation that reveals clues to their needs.

Great service can be accomplished even in the most high-pressure environments, where supervisors are ready to leap from their chairs if a call exceeds the allotted talk time. High productivity does not rule out polite, caring, genuine conversations. But they will not happen accidentally on a large scale. Unless managers deliberately conceive and cultivate a culture of good service, those caring, thoughtful questions will be the first casualties. Managers cannot just say, “Be polite, but do it faster.” The environment, the measurements, the training, and the daily interactions of managers and supervisors must be supportive of the service culture.

If the reps’ main view in the contact center is a monitor with a red line showing how long they have been on a call, their dominant concern will not be caring, but hurrying.

Questions for Contact Center Managers:

- *How do you define great customer satisfaction?*
- *Do your reps share that view?*
- *Are they trained in delivering true satisfaction?*
- *Do you reward reps for setting great examples of satisfying customers as much or more as you reward them for fast calls?*
- *Do you measure rep satisfaction?*

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Summary

The truth is, contact center productivity and great service can go hand in hand. When I discuss these barriers with contact center professionals, I discern that some simply do not quite believe they can overcome these barriers in their own companies.

The other day I had to get new tires on my car in a hurry. I decided to try a nearby tire store. When I walked in I knew I was out of my comfort zone. It was a guy's place—a tire guy's place. Shouting, bantering men, the smell of grease and tires, and cars and equipment everywhere. The owner came from the shop to the front desk to take care of me, wiping his hands and shouting over his shoulder to the other guys. As he did, the phone rang, and with a polite nod to me he picked up the phone and answered.

If you had been at the other end of that call, you would have thought he answered you from a big, private office with not another thing on his mind except taking care of you. A warm greeting, his name, his shop's name, a sincere offer of help, empathetic listening, thoughtful questions, an attitude of yes, a complete wrap-up unhurried by my presence. From the moment the phone rang, he transformed himself entirely and sincerely to satisfy the customer on the other end. Even a contact center idealist like me could only score it as a perfect call.

If he could do that, if the plastic bag lady could do that, surely contact center managers can leave behind the old, feeble proxies for service and rise to numbers that honestly report customer and rep satisfaction.

"Computers are useless," said Picasso. "They can only give you answers." For too long, contact center managers have been quick with the answers—quick with numbers that tell the wrong story or only part of the story. The important answers resist computing. Only culture change will enable contact centers to exchange "rushed, routine, and robotic" for "personal, authentic, and helpful."

About the Authors

Johanna Lubahn is neither a bean counter nor a bean harvester, but a contact center sales and service expert and Cohen Brown's Managing Director for Contact Center Services, working with banks and bank contact centers around the world. Her clients are pleased to learn how they can remove the obstacles that would otherwise make their contact center representatives rushed, routine, and robotic. Johanna_Lubahn@cdbg.com, (310) 966-1001.



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