Call Center Power White Paper

Contact Center Operational Turnaround Engagement for an Outsource Provider supporting the Transportation Security Administration (TSA)

Engagement Overview

Our “Client” (SII) is a Business Process Outsourcing (BPO) company, located in Landover, MD; with call center sites in Landover, Colorado Springs and Albuquerque. SII primarily provides contact center **outsourcing and technology services to various federal government agencies**, including Transportation Security Agency (TSA), Federal Deposit Insurance Corporation(FDIC), and the Federal Emergency Management Agency(FEMA).

Our “Client” decided to engage Call Center Power because their call center operation, supporting the TSA, **was struggling**. In order to fully understand the scope and causes of the underperformance the Call Center Power team conducted a comprehensive, operational assessment covering every aspect of the business related to TSA. Our assessment process for SII consisted of a 3 week review of all processes and procedure documents, training materials, performance reporting, ACD data, detailed quality process review, numerous focus groups with the call center staff (at all levels), individual interviews with stakeholders and individual contributors, contract review and much more.

After reviewing the findings of our assessment with the SII senior executive team, it was decided to bring **Call Center Power in for a much more involved engagement designed to “turn around” the performance** of the outsourced TSA contact center operation.

Engagement “Day One” Performance

- Average Speed of Answer: 45 - 60 minutes above contracted target (30 seconds)
- Service Level % (SLA %): 50 + % below contracted target (78% within 20 seconds)
- Abandonment Rate %: 40 + % above contracted target (4% ABA)
- Email (offline) Service Level %: Consistently 50% below contracted target (95% within 48 hours)
- Customer Quality: 30 - 40% below contracted targets (95% Quality Evaluation score)
- Annualized attrition rates of 200 + %
- Reportables (Flight Security Component): 2 - 7 times contracted target (0 reportables monthly)
- Average Handle Time: 12 + minutes (goal of 9 minutes)

End of Engagement Accomplishments

- Average Speed of Answer: 30 - 60 seconds - reduction of 45 - 60 minutes and consistently achieving contracted average speed of answer target
- Service Level % (SLA %): 70% - 79%. 200 + % improvement
- Abandonment Rate %: 4% - consistently achieving contracted target (4% ABA)
- Email (offline) Service Level %: 95 + % with 48 hours - consistently achieving contracted email service level target (95% within 48 hours)
- Customer Quality: 25% improvement in overall Quality performance
- Annualized attrition: 41% annualized, 487% improvement over “day one” attrition trend
- Reportables (Flight Security Component): 0 Reportables 8 out of 10 months (Goal is 0 reportables per month)
- Average Handle Time: 9 + minutes, 25% improvement in average handle time performance
- By exceeding our client’s and TSA’s expectations, Call Center Power was granted an 18 month extension to the engagement which gave our team the time to complete the turnaround effort.

Problem Statement

As a result of our comprehensive, operational assessment, we **identified key problems** in almost every functional area of the contact center. In addition, we identified numerous process and workflow issues throughout the operation as well as a critical flaw in the operational model of the business; all contributing to the organization's inability to achieve the contracted targets of the project. Combined, all of these factors created **inefficiency, lack of performance accountability, poor morale, low quality service, poor "first call resolution" and more.**

A major component of our client's turnaround strategy was to bring Call Center Power's operational and workforce management expertise to bear on the situation. Step one was to embed one of Call Center Power's senior Operations Advisors in the contact center; taking on the role of Interim Operations Director. Once in place, **we immediately went to work**. Below are the primary challenges and barriers to success we had to address as we began our work.

Initial Challenges and Barriers

Leadership

There were several primary issues related to the onsite leadership team within the operation. First, **the organizational structure was inappropriate for the size and complexity of the contact center.** The center housed over 100 agents, processing approximately 75K transactions per month. When we initially engaged, there were Supervisors in place as well as an Operations Manager but no Site Leader. In addition, neither the Training or Quality departments rolled up to a leader. They were left to their own devices.

Second, the Supervisors and Operations Manager in place were **very inexperienced** at leading people as well as interacting with clients, managing performance, handling employee relations issues, and more. Third, the Supervisor team was a very transactional group. They literally processed emails and calls most of their day which took away most of their available time to focus on their agents. Supervisors not being able to spend time with their agents to help them be successful, was a primary factor driving unusually high attrition and lowering morale.

Performance Management

Another critical component of a successful call center operation that was literally missing from this contact center was a formalized and effective performance approach. **The leadership team was not using any types of tools or collaborative coaching practices** to drive performance. In addition, with the exception of Average Handle Time and attendance, there was no data or reporting dashboards available to the leadership that would give them visibility into the performance of the operation.

The main "metric" that was being managed was attendance. **Attendance issues** in the Albuquerque contact center were very poor. Each day, the operation could count on losing 10% - 25% of the staff per day; just in call outs, leave early and late arrivals. Because attendance was so poor, the center was losing agents faster than they could be onboarded. This was a huge issue for the operation because any new hire to the business had to pass a 2 + month, federal clearance process. This situation significantly reduced the number of agents the organization could actually onboard, which negatively impacted every area and metric within the operation.

Aside from attendance, performance management at all levels was lacking as individuals essentially had free reign over duties without consequence or direction from supervisors.

Recruiting

As previously mentioned, **onboarding any new employees into the organization was extremely slow** because of the federally mandated clearance process that every new hire had to go through. This situation significantly slowed down the organization's ability to build its team over time. Exacerbating the problem was the fact that our client's recruiting and clearance management process were broken. Anyone in the clearance process would not hear from an SII representative for months. By the time the individual did clear, they had long since gotten another job and put SII out as an employment option.

For recruitment, the call center literally had a receptionist taking in applications and **interviewing less than 10 people a week**, generating 0 - 1 offers per week. This anemic pace of recruiting, combined with the very high % of people within the clearance process dropping out due to lack of contact; caused staffing levels of the operation to decline precipitously over the bulk of the 6 months before we arrived.

Customer Quality

Customer Quality was one of the primary contracted metrics of the project. Unfortunately, the call center's **quality scores across the board were almost half of the established goals**. There were several key reasons for this poor quality performance.

- The SII QA team were evaluating customer interactions with an evaluation tool and scoring methodology that did not match TSAs evaluation tool and approach. This was a CORE problem because the service staff were not driving performance in the areas that were important to TSA.
- The QA team were not generating aggregated data or reporting around quality so the leadership team did not know where to start, relative to driving customer quality in the center.
- As previously mentioned, even if the leadership team did have quality assurance data, they were not in a position to effectively coach or performance manage their staff to drive improved quality across the operation.
- New hires were not trained on the quality process at all. The new hire training did not cover the evaluation tool, quality expectations, how to achieve good quality and more. So when the new agents graduated training to the floor, they were ill equipped to deliver a high level of quality to their customers. With the Supervisors not being able to coach quality, a new agent never learned what good quality service was relative to TSA or how to achieve it.

Training

As we reviewed the new hire training curriculum during our initial operational assessment, we quickly uncovered that the **new hire curriculum was outdated** and not designed to effectively teach adult learners. The training curriculum had not been updated in so long, almost ⅓ of the new hire class was taught via ad hoc documents and operating procedures that were introduced into the center over time.

In addition, the items that were covered, including critical agent work flows, processes and systems, were covered at a high level with little to no practice activities, roleplays, group activities, assessments, etc.; all of which would help to drill and drive repetition in order to improve retention. Because these were not assessments, skills checks or certification process built into the new hire curriculum, SII was graduating many agents to the floor who were ill prepared to answer customer questions or drive customer quality.

In addition, the most important contracted metric of the project was "Reportables". **A Reportable is a security event that could jeopardize the safety of a flight, its passengers and its crew.** The contact center's primary responsibility, above all else, is to CATCH any reportable events and property "Report" them to TSA for remediation. If the contact center "missed" a reportable, it carried significant penalties for our client and endangered the lives of people on the flights associated with that reportable.

As big of a deal as a "Reportable" was, the new hire training curriculum did not contain any information or modules designed to train reportables to the new hire agents. **As a result, the staff were missing multiple reportables every month**, which was costing SII tens of thousands of dollars a month and endangering the lives of 1000's of people.

Employee Morale & Culture

As evidenced by the very high attrition the call center was experiencing, the **employee morale in the center was very low**. The poor morale was being driven by several key factors.

- As previously mentioned, the Supervisors were not actively communicating with the agents on expectations, their performance or providing coaching. All of which would help them to do their jobs better, making it easier and less stressful overall. Most of the time, when a Supervisor would interface with an agent, it was usually a negative experience related to administering progressive discipline for attendance or a behavior issue. In our focus groups with the agents, they expressed over and over again how they rarely hear "thank you" or "good job" from their Supervisors relative to their work.

- Compensation practices within the business were not perceived as pro-employee at all. As a matter of course, employees were not given annual reviews or raises. In addition to that, when agents were promoted to exempt level positions such as Supervisor or Trainer, their compensation was changed to a salary but set at basically the level they were at as agents. Because of this approach, newly promoted agents would end up making less than they did when they were agents. Over the course of our engagement, we had several folks who had been promoted ask to be demoted back to agent so they could start getting OT and could make more money.

- In large part due to the compensation practices described above, there was a widespread, underlying fear throughout the operation relative to the financial security of the organization and uncertainty about the project getting extended.

- The organization was mandating that all employees work OT every week, which was driving widespread burnout among the staff and caused a great deal of stress for the employees as it was impacting their ability to take care of their family outside of normal business hours.

- The operation did not employ any sort of formal pay for performance or reward & recognition program to drive positive employee morale.

- There was a widespread perception that when an employee relations issue or complaint did arise, these were not taken seriously. The team felt as if they would be “victim shamed” when going to HR which drove the idea that there was nowhere to go if an employee had an issue.

Missing Interdepartmental Linkages

The operation itself was **very siloed** and despite the need for collaboration between departments, there was an alarming lack of interdepartmental linkages between all stakeholders. The different departments did not work together to anticipate and plan for the needs of the business nor did they work together to formulate and align around processes and strategies that would positively impact the business. Training, Quality, Workforce Management, Operations, Human Resources, and even IT, were all working in silos; which caused major confusion and misalignment throughout the operation.

In addition, the **different departments were not sharing any data or insights with other departments** that they organically acquired every day. As previously mentioned, quality was not sharing evaluation data. Training was not sharing information on their trainees or the effectiveness of their training. Operations were not communicating back with Training or Quality relative to the performance trends and observations from “the floor”. Workforce Management was not generating and sharing key data and analysis with the business, etc.

Workforce Management

With a call center operation as complex as SII's serving TSA, an effective Workforce Management function was critical. We discovered early in our assessment that the **existing Workforce Management function was sub standard and missing many important components of that function.** The existing team consisted of 5 people, 4 of which were doing real time adherence. The remaining resource was doing their best to manage schedules and the attendance line. The other important, and higher value functions of workforce such as capacity planning, forecasting, effective schedule development and management, data analysis and the generation of usable insights for the organization; were non-existent.

The poor Workforce Management performance was causing many problems within the operation. Supervisors and agents were creating schedules on their own; resulting in agents working when the business did not need them. The attendance line was an email which made it very easy for people to call out. Because they did not do forecasts or capacity plans, the business did not know how many people it needed to recruit and bring into the call center. It was always a "guess".

In addition, the Program Director and senior executives at SII, having to explain poor performance and ad hoc issues to the client on the regular basis, had no real data or insights they could leverage to have these discussions with the client. This caused major credibility problems for the organization.

Too Many "Single Points of Failure"

A significant risk to the business were the high number of single points of failure that we identified with the operation. When we began our work, we realized there were an inordinately **high number of individuals who were considered "SMEs"** on single pieces of the business, who would not share the information and knowledge they had with the rest of the business. Many of these individuals were under performers who believed their jobs were protected because they felt the business could not let them go because of the information they were hoarding. This situation was another reason the morale and the quality performance of the center was low.

This knowledge hoarding, lack of sharing and a desire not to collaborate with other employees in the business; caused real tactical issues that made it much more difficult on the agents to do a good job. Because of this information hoarding, training documentation, job aids and knowledge bases were not getting updated. Service levels on escalations were not being met. Email queues were stacking up because the offline teams could not get timely answers to their questions and much more.

Within the first week or so of our engagement, we were able to categorize approximately 10% of the existing employees as an information hoarder and single point of failure. Eliminating these single points of failure throughout the business quickly became one of our top priorities.

Ineffective Client Communication & Interaction

Overall communication and collaboration with TSA (SII client) was **disjointed, intermittent and very frustrating for TSA.** Below are a few examples of the client communication challenges SII was facing with TSA.

- As a normal course of business, the contact center operation would receive a high number of emails from the TSA service team throughout each day; regarding any number of service related issues. Their expectation was that the call center would respond to the customer and close the loop with TSA within service level. When we began our work, this process was broken. Most emails were not being answered. Customers were not being followed up with and SLAs were not being met.

- As mentioned previously, the call center team and the TSA team were following completely different paths relative to customer quality. There were completely different evaluation tools and scoring methodologies as well as no joint SII/TSA quality calibration activities in place between the two parties.

- One of the most important lapses in communication between the call center and TSA was the lack of a formalized and effective "intake" process for changes to TSA processes, security guidelines, technology updates, etc. When a change was made, depending on what it was, an email would go to one of the single points of failure mentioned previously. The contact center staff would then rely on that individual to faithfully execute their job and manage the communication and integration of those changes into the operation. The communication and integration of these changes rarely happened causing widespread confusion, service quality issues, compliance and security issues.

Flawed Operational Model

Not only were the individual departments within the business siloed and essentially working independently, **the individual functions that made up the transactional part of the business worked in silos as well.** On the inbound call side of the house, each queue was skilled and staffed separately from the other phone queues. Multi skilling of resources was not in practice and there was no sharing of resources. This was awkward as agents who were taking call after call after call would see their peers, who were not on calls, reading and playing on their phones for a long time between calls. This situation was very bad for morale.

In addition, there were several different types of “offline” (email and web form generated interactions) queues that were staffed and managed with the same, siloed approach that the phone side of the house employed. Resources were separated and occupancy across the operation was approximately ⅓ of where it should have been. This operational model was costing the organization hundreds of thousands of dollars a month in lost productivity, over staffing costs and contract penalties.

Real Solutions! Real Results!

As outlined above, the call center operation had a host of challenges that kept it from achieving success however the Call Center Power team was up to the task. Once embedded within the operation, we began to leverage our decades of experience and powerful team of specialists to implement **"best in class"** contact center operational practices but also to design and execute operational best practices tailored to the very unique needs of this business. Below we will explore how we attacked each of the challenges outlined below.

Leadership

Breaks in the organization structure of the call center began to be immediately addressed with the embedding of one of our Senior Operations Executives as the Site Operations Director. Once in place, our resource began to evaluate the existing Supervisor and Manager team to determine their effectiveness, potential and "fit" for the direction in which the center would be going as we moved through the turnaround efforts. In an effort to build the leadership team, we moved several individuals out of the organization and promoted a couple of folks who were high performers and showed a high commitment to the organization and its people.

We also **conducted a search for several external candidates with deep contact center experience and expertise.** As a result of all of these changes, we ended up with a diverse, versatile and capable Supervisor team; able to help each other in every aspect of the job.

In addition, we decided to bring in an additional **Operations Manager** who had a background in quality as well as operations. Once this individual began, we divided the Operations Supervisors into two groups; with one group each reporting to an Operations Manager.

In addition, the Quality function reported to the quality experienced OM and the Training function reported into the other OM. Once this org change was made, we worked with these managers to develop functional roadmaps for the Training and Quality function, then implemented ongoing communication processes to ensure the milestones and tasks outlined in those roadmaps were on track.

As previously mentioned, because of the transactional nature of the Supervisor role, the Supervisors were able to spend almost no time with their agents to coach, develop, performance manage or support them. Almost from day one, we realized that the Supervisor role would have to be reengineered to include the usage of tools, effective coaching and performance management approaches, motivational techniques, progressive discipline practices and more, in order to ensure they were focused on driving performance versus working individual transactions.

The first step was to remove the transactional work off the Supervisor's plate so they would have time to conduct any coaching and performance management approaches we implemented. Through our efforts to improve our client's recruiting and onboarding velocity, we were able to identify agent level resources who were able to take on much of this transactional work which opened up a great deal of Supervisor capacity, affording them the opportunity to focus much more time on their agents. In addition, this additional coaching and performance capacity enabled our team to launch the critical performance management plan that would be essential to turning the results around within the call center.

Performance Management

Implementing a comprehensive and impactful performance management approach within the operation was critical to the long term survival of the project. As previously mentioned, for all intents and purposes, there **were little to no performance management or coaching tactics** taking place in the operation when we began our work. Once we increased staffing levels, improved the effectiveness of the leadership team and opened up their capacity to spend time with their individual agents, we were able to implement our performance management approach. The "Big Rock" elements of the approach are outlined below.

1. We introduced a series of formalized and documented performance coaching and action planning tools into the operation. These tools guided the Supervisors through the coaching and performance management process. They suggested tactics, provided scripting for one on ones, provided documentation templates and more.

In addition, performance coaching expectations were developed and communicated with the Supervisor team mandating they formally coach at least one agent every day, and complete the associated coaching tool and performance documentation tools. This documentation would then be turned into their respective Operations Manager by the end of each work week.

2. Using the new performance and coaching tools, we implemented a "top/down" performance accountability approach. All of the coaching and documentation tools were turned in and reviewed by each Supervisor's respective Operations Manager then used by the Site Director, along with a series of new reporting and performance dashboards, to review Supervisor and OM level performance in detail.

3. With the advent of the myriad of new data and reporting that was implemented, we began to have visibility into the “outliers” in the operation, relative to every important metric. This additional data gave us agent level visibility into AHT, utilization, AUX usage, Quality and more.

With this new visibility, we began having daily huddles with the Supervisor team where we reviewed the previous days agent level performance, identified the outliers in each metric, discussed what drove the performance of each agent and what the next steps would be that day to improve performance. This practice, along with the coaching and performance management tool process; were key transforming the individual and overall performance of the organization.

4. When we began our work, it was clear that the poor attendance of the staff within the operation was almost single handedly responsible for the inability of the operation to meet any of the contracted service levels; on a daily basis. The operation was losing 10% - 25% of its staff every day to call outs, leave earlies and tardies. In order to remediate this situation, we took several important actions.

We implemented a process whereby anyone who was calling in had to actually speak to their Operations Manager on the phone. If they did not talk to their OM, the individual would automatically proceed to a verbal warning. This was an extreme tactic for sure but one we had to take quick in order to begin to improve this untenable attendance situation.

We made major changes to the current attendance policy, taking it away from a “point based” system where employees could effectively buy back points by working OT, or achieving other milestones. This approach continued to encourage poor attendance.

As part of the daily Supervisor performance management approach we implemented, Supervisors were required to discuss and update each agent's attendance progress, every time an individual would have an "occurance".

5. Using quality evaluation data generated by the QA team, we began to identify the gaps/issues causing the biggest problems for the center's quality. Generally, these issues were categorized as process gaps, knowledge gaps, access related gaps, etc. Once we identified the larger gap categories (ie. Missed Reportable or the Undeliverable Email handling process, etc), we would prioritize them and move the top category gap into our new, monthly Knowledge Quiz process.

Once assigned, our training department would build a quiz of up to 10 questions, utilizing real examples observed by the quality department from the previous month. These mandatory quizzes would then be pushed to the floor where each agent, Supervisor, Operations Manager, Trainer and QA Analyst had to take them. A passing score was 90%. Once complete, anyone who did not achieve a grade of 90%, was then formally coached/re-trained via a personalized, one on one coaching process by their Supervisor, a Trainer or one of the Floor Coaches.

Throughout the process, we would track each individual's scores and would issue follow up quizzes, post coaching to ensure competency in the desired subject area. These quizzes were rolled out every month, on a different topic and helped to drive our Missed Reportables performance to almost zero (which saved tens of thousands of dollars per month and safe guarded travelers). This process had a very tangible and positive impact on the organization.

Recruiting & Security Clearance Process

Given the low staffing levels in the operation, coupled with the high attrition and the anemic hiring velocity; the need to improve the recruiting process was immediate and paramount. Solving the recruiting issue really needed to focus on two areas. **Baseline recruiting velocity and supporting individuals who are in the security clearance process.** In order to impact these two areas, our team implemented several key enhancements to these processes designed to not only increase the recruiting velocity but also to increase the % of people who make it through the clearance process and onboard with the company. These enhancements are outlined below.

Segmented the hiring and clearance process into a funnel and established the baseline metrics for each level of the funnel; where we were at day one and established optimized goals.

Immediately engaged an outside recruiting firm to manage the sourcing and recruiting of candidates. This firm brought a team of professional recruiters, and large sourcing channels to the table that significantly increased the # of interviewable candidates into the top of the funnel.

We hired an HR generalist to support all of the backend administration of the background process as well as candidate outreach through background.

4. Reassigned an administrative assistant to manage all background cleared candidates through the multi month, formal security clearance process. This individual interfaces directly with the candidates as well as the government entity responsible for processing the security clearances. Our resource ensured that important emails and documents were received and completed. Clearance process milestones and timelines were met. She completed numerous "warm up" calls to the candidates to keep them engaged in the process. Developed and managed the reporting and data the business needed to continually optimize every level of the funnel.

As a result of these efforts, **recruiting velocity increased by over 10 times, quadrupling the # of candidates going through the clearance process at any given time.** In addition, we tripled the 5 of people who actually joined the organization once they were cleared. Training class sizes went from training 1 - 3 people per month to training as many as 17 people per month. The significant increase in staffing levels created by these efforts enabled most of the improvements we were making in the center as well as empowered the leadership team to begin holding everyone accountable to their performance. It was a game changer!

Workforce Management

As previously outlined, **our client effectively did not have a functioning Workforce Management function.** Implementing an effective workforce capability, and all of the associated best practices, data, insights and visibility into the business that comes with; was imperative to the short and long term success of the project. As such, workforce was one of the first challenges we tackled. Below are the primary tactics we employed to build up our client's Workforce Management function and make it an effective contributor to the eventual success of the call center.

1. We immediately **deployed our team of seasoned workforce management professionals** to the project. Our resources included a workforce management executive to lead the rebuilding effort as well as work directly with our operations consultants and client executives to reveal insights into the business as well as strategy development.

The existing Workforce Management team resources were released from the company or redeployed into agent level positions. This was done for two main reasons. First, there were several individuals in the existing team who were upset with their new leadership and they were not happy about the process and tool changes we were implementing.

2. Second, several individuals just did not have the skill set or ability to learn, in order to be effective as a workforce management resource for this project. We backfilled these individuals with our team as well as through internal promotions of existing staff. These personnel changes resulted in a much more capable, nimble, versatile and useful team.

3. Our new team of workforce management resources immediately went to work to identify what data was being generated by the business, where it was coming from, how accurate it was and how it was being used. Their efforts uncovered some major issues here. They quickly realized that even though the ACD platform (Genesis) and CRM (Salesforce) were throwing off a large amount of data from the business, almost none of this information was being aggregated, analyzed or shared with the business. The operators in the call center did not have visibility to call volume trends, email and CRM ticket volumes, agent and center level productivity, utilization, attendance trends and many more.

Through our team's efforts, and using **improved data management tools such as Power BI, our new WF team built automated processes to ingest, aggregate and distribute key data on every aspect of the operation; call and email.** All of this information was loaded into Call Center Power's Workforce Management and Data Analytics platform where is was organized and displayed in an organized and easy to use manner by the Operators. Performance outliers in every key metric were identified and highlighted. Important business trends were showcased with valuable insights into the drivers and so much more. This new visibility into the business enabled the operations team to establish a myriad of top/down accountability, performance management and coaching practices that helped to transform the overall performance of the business.

4. In addition to the basic reporting needs of the business, the operation was also in desperate need of baseline workforce practices such as the implementation of a true forecasting and capacity planning methodology, schedule and shift development and optimization, attendance reporting and management and real time adherence processes.

Using the myriad of data we were now generating and actually seeing, our folks immediately began to leverage their decades of expertise and our proven tools, to build out all of these processes. Using a very data driven approach, call volume trends were identified over the course of the previous year. Important data points such as average handle time, interval volume velocity, seasonal and holiday trends, TSA changes, weather events, etc. were all considered in the analysis.

With all of this information in hand, we implemented a formal volume forecast and capacity plan as well as a forecast review and update, on a monthly basis. Over the past year, our forecasts have never been off by more than 5%. This new forecasting process has enabled the business to much more accurately predict the staffing requirements of the operation over time; saving our client hundreds of thousands of dollars a year in wasted labor costs.

5. We developed optimized shift schedules, using a variety of approaches including full time and part time resources, split shifts, weekend only shifts, etc. Breaks and lunches were also reviewed in real time and adjusted as needed throughout each day. All of these efforts were critical to helping drive the major improvements we achieved in every aspect of the operation.

People Practices and Culture

The incredibly high attrition within the call center was a direct cause of the operation's under performance prior to our arrival. **With annualized attrition rates over 200%, building a high performing call center operation was out of the question.** In order to remediate the high attrition within the center, our team implemented a variety of tactics designed to improve overall morale amongst the employees as well as establish an ongoing, employee centric culture. A few of these tactics are outlined below:

1. Implemented a **performance incentive program** at the agent and Supervisor level that rewarded/paid good money when these folks achieved predetermined performance levels for each of the important metrics. The incentive program covered attendance, quality, average handle time and schedule adherence. There were also components and payouts for employee of the month, top Supervisor team and more. Through this program, the average agent could add approximately 20% per year to their annual compensation just by achieving the baseline metric goals within the operation. This program alone helped to reduce daily attendance issues by almost half.

2. We began to deploy a "Voice of the Employee" survey to the staff and built in processes for feedback analysis, suggestion implementation and proactive communication back to the staff. We wanted everyone to understand that their voice from the survey would be heard and real change would be made based on their feedback. The employees really liked this approach.

3. From day one, we eliminated mandatory overtime. When we arrived, a **mandatory OT** program had been in place for months. People were tired, burned out and it was a primary reason why people were leaving the business so fast.

4. Eliminated a portion of the legacy staff who were cancerous to the culture, treated employees poorly or who were unproductive/ineffective in their jobs. People in the operation feeling like they were having to carry other's weight because those people were not working (which was true in many cases), really helped to drag down the morale within the call center.

5. Began publicly celebrating employee milestones and accomplishments in the call center. For example, we would bring in a large cake each month to celebrate the birthdays of all of those folks born in that month. We issued CEO signed certificates to recognize work anniversaries with our client. We initiated a KUDOS call STAR program that publicly displayed and celebrated compliment calls. These programs, and many more, really helped to "lighten" up the environment within the center and create some fun among the employees, which was badly needed.

6. Upgraded the Human Resources position in the center. In addition to the number of human resources related best practices that this new resource implemented; they were great with the employees truly creating a "safe" place for the employees to share their concerns. The new HR resource was a great partner with Operations and having that "neutral" party in place was also a shot in the arm for the overall morale of the center.

These are just a few of the tactics we employed to improve the employee attrition within the operation. **They were so effective, annualized attrition dropped from over 200 + % to 41%.** This significant reduction in attrition was key to the success we eventually achieved on this project.

Training

As we began our work on the TSA project, we quickly realized that **the new hire training curriculum was outdated and in many areas;** incomplete. This was creating huge knowledge gaps for our call center agents and staff. They were graduating training and in many cases, they were not ready to interact and assist customers. In order to remedy this, our team worked with the existing training staff and several internal subject matter experts to conduct a page by page review of the curriculum. This review lasted several days and during that time, we were able to identify all of the material that was missing.

Once identified, we allocated one training resource and one SME to work together to update the curriculum. With these 2 resources solely focused on this effort, the training curriculum was made whole within about 90 days. This review also showed there were aspects of the curriculum that desperately needed expansion (ie. the Missed Reportables section). The training development resources we assigned to fill in the gaps in the curriculum also dedicated time to expanding the critical modules within the training that needed it.

We also needed to make several important upgrades to the training staff as well as the linkages between training and the rest of the business. To that end, we upgraded several of the training facilitators to individuals who had experience training adult learners and were more effective in driving information retention of the material trained. In addition, we upgraded the primary curriculum developer which ultimately improved the quality and thoroughness of the material as well as ensured effective instructional design principles were employed in the curriculum development process going forward.

This upgraded resource was also instrumental in establishing an impactful and ongoing communication process between our client and TSA to ensure any changes to processes, outages, technology changes, etc, were taken in from TSA and immediately injected into our new hire and ongoing training efforts. This individual was also responsible for creating and deploying all of the important job aids needed to communicate changes. In addition, we established a formal "Nesting" program to ease our trainees' transition to the floor. This nesting process helped to significantly improve our new hires readiness to handle calls, when transitioned to production.

Lastly, we had to address the significant need for **agents to have access to job aids, training material and other resources they could use to find answers to their questions in real time.** When we arrived, we discovered that the Supervisors, Operations Managers, even workforce team were the primary resources to get questions answered. This meant that the operation was losing upwards of 100 hours per day, because agents were putting customers on hold, walking around the center trying to find a resource and in many cases; literally standing in line for sometimes 10 + minutes to get their questions answered.

This situation was untenable. To address this situation, we quickly leveraged the Knowledge Base capability within Salesforce. We loaded all available documentation into the KB and organized it in such a way that "top" articles or resources would pop up depending on the call type. This new capability alone significantly lowered the # of hours lost each day to agents trying to find answers to their questions. As we developed new content for the new hire training curriculum and job aids for ongoing training needs and changes, we immediately loaded and organized all of this information into the Salesforce KB.

In addition to the performance management and coaching practices we employed throughout the operation, the upgrades and changes made within the training function were key drivers of the quality and productivity improvements we achieved during our time on project.

Customer Quality

Our client really struggled to achieve the contracted customer quality targets set forth by TSA. In fact, the call center had never achieved the quality targets during the life of the project. Because of the complexity of the customer interactions as well as heightened security protocols the agents had to follow; achieving the quality goal was tough. However, when we began our work, we quickly realized that the operation's quality assurance process and infrastructure was effectively nonexistent. **Getting quality right was imperative as agent mistakes could literally cost travelers their lives so we immediately began work to rebuild the quality process within the operation.**

1. The operation did have a small quality assurance team but they did not have a Manager. As a result, the QA agents were not productive. Data was not being collected and shared with the rest of the operation or the client. None of the high value add activities typically associated with Quality were being done (ie. continuous improvement practices, interdepartmental linkages, etc). There was almost no client communication around quality. To address this situation, job #1 was to augment the established organizational structure and point the QA team into a competent and experienced Manager.

2. Once the new Quality Manager was in place, we worked with this individual to build a comprehensive Customer Quality Improvement Action Plan. In this Plan, we broke the function down into it's component parts and established actions and milestones needed to build or repair each component. We socialized this action plan with TSA to ensure alignment then laid out timelines internally to ensure we had the resources in place to execute the plan.

3. One of the first problems we identified was our client was leveraging a completely different quality evaluation tool and scoring methodology than TSA. This was a big problem because the QA team was evaluating elements of the customer interactions that were not important to TSA.

Most notably, the security components of the customer interactions were the most important piece to TSA. However, the evaluation tool used by our client did not measure anything related to security. Once identified, this was a quick fix. We literally acquired a template of TSA's quality evaluation tool and received training from TSA relative to their process. We then implemented TSA's evaluation tool and scoring methodology into our client's quality process.

4. Now that our client and TSA were aligned around the important quality components of the program, we needed to align around how we scored the interactions we monitored. In order to achieve this alignment, and for our team to acquire a much more acute knowledge of what was important to TSA, we established two joint call calibration sessions per week with TSA's service operations and quality team.

After a couple of months of these meetings, our two teams became almost completely calibrated in our scoring which helped to point our quality improvement efforts in a much more targeted way.

5. Now that we had our new evaluation tool and scoring approach in place, and were aligned and calibrated with TSA, we began to build out a comprehensive quality data collection and dissemination process. We built an automated and aggregated data handling model complete with an intuitive reporting dashboard that showcased outliers and broke down every primary quality component into sub components. This level of visibility was a game changer for Operations as we were now able to apply very targeted actions where it was needed most, saving a lot of time and speeding up the improvement we were looking for.

6. Once the quality data and dashboards were in place, we were now armed to establish and initiate an internal "Continuous Improvement" (CI) process within the operation. To facilitate this process, we established a diverse CI team made up of agents, sups, an OM, QA agent, QA Sup, Trainer. This team then met twice a month to review the most up to date quality data. With this information, they would identify the areas of opportunity, prioritize these improvement opportunities, collaboratively design tactics to address them and then project manage/execute the tactics on behalf of the business.

This process worked very well, drove a good deal of improvement and helped morale because everyone was represented and "involved" in the improvement process. The tactics this CI process undertook ranged from the building and distribution of new job aids, additions to the training curriculum, technology changes, agent and/or customer workflow improvements and many more. This was a very dynamic group that lead high impact work.

7. One glaring issue we quickly identified was that the agents and Supervisors did not really know how to achieve the customer quality, within this environment. This was not a surprise given the lack of data being shared on quality performance combined with the organizational misalignment around what quality components were important to TSA. To combat this, we took two primary actions.

First, we developed a new training module that was specifically designed to teach quality to all new hires. The new Quality module trained the new evaluation tool and scoring methodology, highlighted the more critical components of customer quality in this environment (ie. security and reportables) and actually let the agents evaluate recorded calls and calibrate themselves in the class. **This new module really helped to prepare new agents to deliver the level of quality that TSA expected.** In addition to training the new hires, we fanned out across the operation and conducted comprehensive Quality training sessions with each Supervisor team in the business.

As previously mentioned in the Performance Management section above, Operations fully supported these changes and upgrades by implementing and executing on a wide variety of new performance management and coaching practices designed to drive the performance improvements we committed to.

In order to support the Supervisor's coaching efforts, **we established a "Quality Coach" program.** In this program, we utilized the two agents who had the top quality in the center, to focus full time on conducting side by side listening and teaching sessions with individual agents. Over the course of each week, these two Quality Coaches were able to spend direct time with over 50 agents each; per week. Their targeted efforts, in combination with those of the Supervisors, drove significant overall improvement in the operation's customer quality.

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Ultimately, all of these actions, as well as several others, directly drove the significant quality improvements we realized throughout the call center operation.

Operational Model

From “Day One”, the operational model our client leveraged was flawed. The operation was divided into small speciality areas, broken down to individual phone skills and email/web form interaction types. Within these speciality areas, agents were only trained and only worked calls and emails that came into their very specific queues.

This operational design created hundreds of hours of productive waste every week. One group would be overworked while the group sitting next to them would have very little work to do, would be playing on their phones, loud talking, etc. Not only did this model drive poor service level performance across the business it was also terrible for morale.

In order for our client to have a chance at achieving the contracted service level targets of the projects, **we had to transform the operational model to a much more versatile, nimble and capable one. We did this by launching a large-scale cross training effort, across the operation.** Phase I of this effort was to cross-train the phone resources to take all phone related customer interactions. In addition, we cross-trained all “offline” (email/webform) resources to handle all “offline” work. With this change, we did see significant improvement in the overall performance of the business and actually began to achieve the email/webform response metrics every week and month from then on. The phone metrics did improve as well but we were still not making the contracted goals.

In Phase II of this plan, we then devised a strategy to further cross train the “offline” resources to handle phone calls as needed. As part of that strategy, we worked to operationalize an intraday resource reallocation approach whereby we were able to shift the entire operation’s resources directly to where they were needed; whether it was to the phone or the email side of the house. Once we completed the changes to the operational model, we then began to make the phone metrics on a regular basis and we achieved the “offline” metrics every week and month after the changes.

Lastly, we had to deal with the numerous "Single Points of Failure" that were spread throughout the operation. Several of these areas created significant risks to the business and our passengers as well as significant liability for our client. Working with a variety of team members through the operation, we identified all of the single points of failure within the business and began an aggressive program to identify resources to cross train and to execute that cross training.

We also identified many single points of failure that we were able to integrate into the larger portion of the business. All of these processes and knowledge gaps were documented and shared with the staff via training sessions, individual and team training as well as loaded into the businesses online Sharepoint repository where everyone had access. We eliminated all of the secrets and information hoarding within the business.

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callcenterpower.com • service@callcenterpower.com • (571) 781-1112