How to Use Integrated Performance Management to Drive Performance in Contact Centres

While it did add a sense of urgency, the hot potato did little to decrease handling times....

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Learn from the Leaders

Be Different
Learn from the Leaders:
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Managing performance in a contact centre is about aligning the performance of teams and the individual to the organisation’s strategy. But significant improvements in performance won’t come from creating a few new metrics and reports. One of Canada’s top three Telecommunications providers, Rogers Communications, has implemented an integrated performance management process across its ten contact centres which collectively manage 5,000+ agents. It has delivered over 10% uplift in performance as well as improved staff retention. Read on to learn about how they went about it and discover their secrets to success….

Case Study at a Glance

Everybody running a contact centre knows it is essential to have a clear idea of how their team is performing; and more importantly, be in a position to constantly improve on that performance. What many companies are striving for is a way for their front-line staff to optimize their performance in line with the organization strategy and across all elements of performance simultaneously e.g. sales, quality and productivity. All too often a narrow approach results in ‘flavour of the month’ improvement initiatives. Staff complain about the quality of supervision, don’t know how to achieve their goals and get frustrated which in turn translates into high rates of attrition.

Since the Rogers Customer Care organisation implemented its integrated performance management process, the organisation saw over 10% overall improvement in performance in a matter of months and performance is continuing to improve. Tom Band, Vice President at Rogers Communications said, “A major factor in achieving this performance has been that by providing our people with relevant and accurate information they have optimised their
This case study focuses on Rogers Communications’ contact centre operations and provides an excellent model of how companies should approach performance management. They have achieved great results because they addressed four key elements of performance management in a coordinated way:

1. They worked out what to measure right up and down the organization and how to balance possibly contradictory measures.
2. They defined the processes they wanted staff to follow based on what their best agents were doing. In this way, there were clear ‘best practices’ on which supervisors could coach their people.
3. They turned their coaching process into a science and could track and monitor the quality, quantity and results each team manager’s coaching was delivering so they could help team managers improve their performance as coaches.
4. They used a performance management system that went beyond reports and dashboards to support the whole coaching and performance development process.

The key to success was establishing a holistic set of processes and systems that worked together to change the performance culture and behaviours. Technology was an important component, but the lesson was that solutions need to go beyond the glitz of dashboards and reports to address all aspects of how performance was managed.

**Who is Rogers Communications?**

As one of the top three telecommunication providers in Canada, Rogers Communications (www.rogers.com.au) runs ten contact centres - with more than 5,000 of its 27,000 employees employed as agents. The contact centres’ functions include Customer Care, Technical Support and Dealer Support. With both inbound and outbound capabilities, the centres are structured as an internal service provider to all Rogers’ lines of business which include wireless, cable, high speed internet, home phone, and media outlets including various magazines and radio stations.
What was Rogers’ approach?

Prior to the integrated performance management approach, agents were set an assortment of objectives, which were metrics-based and along the lines of “handle X number of calls” and “maintain a quality score of greater than X”. There were many problems associated with this approach, but primarily, objectives weren’t consistent; they weren’t documented; they weren’t tied to overall company strategy; and they weren’t carefully managed or measured. Flavour of the month management (i.e. a blitz on one particular metric) was common within centres and teams.

Also, individual agent got little information on how they were performing and even less on how to fix it. Measurement, coaching and feedback was irregular and ad hoc, and the annual review was relied upon as the major component of measuring overall performance. Band said, “Since an individual's performance wasn’t indexed across the organisation, there was no scale. We didn’t have an understanding of what top or bottom performance looked like and how it ranged across the people in our ten centres. We couldn’t agree who our top performing agents were or what they were doing that made them the best”

What was wrong with this approach?

Rogers knew it needed a better way to define and measure individual and team success in order to encourage ownership and accountability for results. Clearer goals and measures would enable objective and equitable performance assessment and focused development.

With static, monthly reporting relied on as the primary means of measurement, Peter Berczi, Vice President and Project Lead - Integrated Customer Management (ICM) for Rogers Communication said, “We were always looking back, instead of using leading indicators and dynamic information to drive performance improvements and look to the future.”

Every role had different performance metrics and they didn’t link up across the company's hierarchy. The measures were also misaligned with the company strategy. In short, people didn’t
have a clear view of what was expected of them and what good performance was. Ask 10 agents and you’d get 10 different answers and those answers often weren’t what the company wanted.

A second issue was that the coaching and performance development practices of supervisors where inconsistent both in terms of what they did, when they did it, and what results those practices delivered. According to Band, “Coaching was not repeatable because each team manager leveraged their own ideas and we had no visibility of who was being effective and who wasn’t.”

What did Rogers do?

Balanced scorecards were developed as a first step towards their integrated performance management process. That enabled Rogers to provide common objectives across the organisation and create linked up measures at all levels so everyone was working towards the same goals. But Rogers learned that measurement wasn’t enough to deliver great performance. To translate a great design into great performance they realized they needed to change the performance management culture, processes and tools that they were using.

Rogers’ management also had strong feelings that the approach chosen should reinforce basic performance management ideas and the three “rights” of any employee:

• To know what I am expected to do
• To know how I am doing
• To receive support from the organisation to improve

The integrated performance management approach delivers against these principles. It takes corporate strategy and translates it into terms that front-line people can understand and act upon. Rogers’ process determines high level strategy and then works down through the organisation to translate the strategy into objectives, measures, targets, and initiatives to achieve the desired results. It then embeds these into a systematic
performance management processes that identifies best practices from across the organization, provides coaching and support to help people adopt these practices and improve. They close the performance loop with the measures and reporting that track progress.

Stage one – in house developed reporting platform

The first stage of implementation was to establish a ‘single source of truth’. Each corporate objective was mapped down via tasks and responsibilities to various levels (see figure 1). These new metrics were built into a simple reporting tool. This tool provided static, monthly reporting but didn’t support the coaching processes. It provided a way to ‘keep score’ against the new metrics and reduced the incidence of people disagreeing over what the ‘right number was’ and whether a performance issue really existed.

This approach enabled Rogers to start the education and change process across the organisation to underpin the behavioral changes that would be needed to deliver the performance improvements. It got people used to the new measures and a new data-driven performance management culture. But it also highlighted gaps in the simple reporting solution they had built.

- Monthly, or even weekly, data wasn’t enough. People needed information daily so they could link their actions and performance. This meant coaching could be focused and relevant.
Agents moving between teams and queues made trend analysis at that level difficult. One week an agent’s performance needed to be rolled up into team A, the next into team B. The basic reporting system couldn’t track these changes so it was hard to spot performance problems.

The coaching process itself was the key driver of performance – but because much of that process was manual, there was little visibility of the quality, quantity and effectiveness of coaching being performed.

Coaches didn’t know what to coach against as ‘best practices’ weren’t defined. Rogers didn’t know who the best agents were nor what they were doing.

The lessons from stage 1 highlighted the need and requirements for a more holistic solution.

Stage two – fully integrated performance management solution

The integrated performance management process combines near real-time management reporting, with systems support for clearly defined coaching processes and support. A solution Rogers called Compass was implemented using a robust industrial strength platform to handle the larger number of users and more frequent data feeds and integration. Compass has become the focal point for agent and team manager interaction, facilitating a more proactive and informed coaching culture; and providing a dynamic ‘report card’ ensuring all levels of the organisation are in synch.

Berczi says the performance management mentality has forced Rogers’ people to become more accountable. “We use scorecards to help align overall corporate objectives. We have established performance management processes that make sure that what we’re agreeing to makes sense, is realistic and can be achieved. We’re getting better at delivering what we say we’re going to deliver and it is much more than just driving performance at an agent level. It has forced us to be more objective and accurate in our commitment at the department level.
Compass enables managers to drill down into key metrics to delve into detail. Each agent is provided access to the same five key metrics that measure their performance and they can see their data on a daily basis - both at summary and detail level. Team Leaders and agents can sit down together and agree on any issues and concur on commitments moving forward. Commitments are documented in the software and automated triggers prompt follow up and appropriate actions. “The integrated performance management process has helped us introduce a level of professionalism that we just didn't have before.” said Berczi.

There was an ongoing debate within the management team about the ability to deliver balanced performance. Some argued that great service, good sales results and high levels of operational efficiency couldn't be delivered at the same time. Band said, “We have found that not to be the case. The levels of performance are up significantly since introducing the integrated performance management process - in fact up to 300% for some agents. We have a top performing group who can do it all - and most importantly do it consistently. We've dispelled the myths about not being able to simultaneously achieve high levels of performance on sales, service and cost”

Just as Rogers has a top performing group, it also has lower performers - which are where the benefits of the coaching component of Compass are best highlighted. Band said, “The solution has been helpful in setting benchmarks because Compass enables us to establish standard practices for coaching. This assists with correct problem diagnosis, goal setting and determining activities to improve results. Only best practice coaching methods and processes are added to the system. We no longer have a secret source - if someone does something outstanding, a team will test and document the process and make it available to everyone. We’ve also been working with the Human Resources team to develop the optimal agent profile that is now based on a clear knowledge of who our best agents are so what we're learning can be carried through to the hiring process.”
What were the results?

What Rogers has learnt along the way is sure to interest anyone thinking about implementing an integrated performance management process. As Berczi says “We can still make considerable improvements to our operations, however the process has brought a much needed focus - it’s had the single biggest impact in performance gains in the past 18 months.”

Rogers compensate people quarterly, with performance based on where they sit on a common performance index made up of a composite the five key balanced scorecard measures. Band commented, “Just by having the clarity and transparency of the scorecard and tying it to agent’s quarterly bonus - without changing anything in our leadership behaviours - we achieved a 10% performance improvement in a few months that has been sustained for one year and performance is continuing to improve.”

As well, employees see the performance management process as a fairer way to measure performance and help them to improve. Previously, one agent may have had more calls, but with low quality. With performance compensation now based on where an agent falls in the national ranking, the balanced view is supported. Staff engagement has improved and turnover of the best agents has dropped.

Coaching is also now measured in minutes by agent, by manager - and there has been a significant increase in time spent coaching as tasks associated with collating data and reports have been automated and supervisor time freed up. The leadership level has become more self-aware and there is an understanding of who spends enough time with employees, and whether the tasks they are performing are relevant. The changes in performance of agents that Compass makes transparent also make it clear whose coaching is effective and whose isn’t allowing managers to provide support to the team leaders to help them improve too. Band commented, “We now spend more time doing something about performance, rather than talking about it.”
Lessons from Rogers Performance Management Experiences

An incremental approach can work - The first stage was static, providing only monthly reporting with limited agent involvement; however it enabled the company to grasp the concepts and understand who to involve before embarking on a more sophisticated approach. Berczi’s advice is to pick one or two centres or certain groups within your centre and invest time to work out how to change the culture. The difficulty in implementing this type of performance management process is firstly achieving ‘buy in’ to the concept. Berczi said “We achieved this with the first stage and the next step took the entire approach to a far more sophisticated level, which by that stage we were more than ready for.”

Don’t make it an IT project - data quality and timeliness is important but the technical integration of data sources is not hard. The most important and difficult things are the people and process components and getting clear business definitions for the metrics that align with corporate objectives. It needs to be a business project completely integrated with corporate objectives not a technical project about producing dashboards and reports.

Don’t let the Balanced Scorecard force your focus on the short-term - whilst Compass now provides daily dynamic reporting, Berczi says you have to be careful not to focus too much on the short-term. “We are fairly short-term oriented - which is normal in a contact centre operation because the business is so tactical. However, you have to be careful to maintain a strategic view of the organisation - review how you’re doing on a monthly, quarterly and half-yearly basis. It is important to guard against having so much data available in near real time that you lose sight of the big picture.”

Make strategy part of your front-line employees’ day - designing the scorecard that drives the process isn’t the hard part - changing the culture and behaviours is. Don’t underestimate the importance of effective communication and employee education - both crucial to success. At Rogers, employee education booklets
were created to explain the strategies and tactics being pursued. There was also a booklet created containing definitions of each element of the scorecard. Not only did employees receive a definition of their own scorecard, they received their team leaders and their managers, right up to the CEO. This gave everyone an understanding of how their performance impacted company strategy - and how everyone’s performance rolled up to the same goals.

**Involve everyone from the beginning** - If direction for this approach comes straight from the top, with no input or interaction down the line - be prepared for a mutiny! People want to know exactly what is expected of them. They want to know what their objectives are, how they are doing against those objectives and how the organisation is focusing its energies on helping them. Focus Groups with employees are a good way of finding out what agents are thinking. Band said, “The information gleaned in our Focus Groups underscored that employees felt there was no consistency around metrics measured - and if it wasn’t measured, it didn’t matter! The scorecard that was the foundation for the performance management process became our line in the sand to help people define what was important across the board.”

**Dedicate project resources for a fast, hassle free implementation** - implementation took six months with part-time resources. Band said, if they had dedicated project resources internally, it would have taken half that time. As it was, everyone involved had their full-time job to do, with this project as an additional responsibility. Again, this is where good consultants who have ‘been there and done it’ come in because they filled the gaps when Rogers lacked the required time or expertise.

**Summary - A shift in culture = success**

This case study provides an excellent model of how companies should approach performance management. The entire call centre operations management culture at Rogers has become more focused, fact driven and consistent. Everyone is working towards the same goals, with a greater understanding of the overall company strategy and the part they need to play in it. Today employees optimise their
own performance through the visibility that Compass gives them on areas that need improvement. Team Leaders and Managers are more focused on enabling better performance rather than collating reports and performing administrative tasks.
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