GTACC COVID 19 Webinar Notes

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We are pleased offer you a summary of ideas shared during our March 20, 2020 webinar.

WHAT ARE WAYS TO INCREASE CAPACITY?

Focus on One Channel and Do it Well

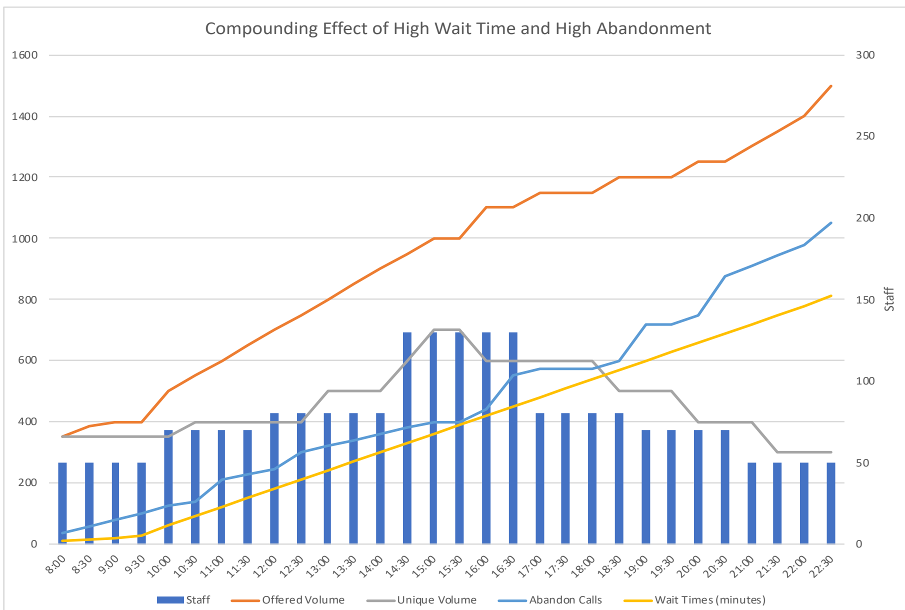
- Customer accessibility to multiple channels increases duplication of contacts when turnaround times are high. This puts greater stress on team members and higher frustration with customers. Implement this strategy if you value connectedness versus responsiveness.
- During this time, customers know that wait times will be long. Wait times are often not remembered but our collective experience tells us that a customer will remember forever how they were made to feel. If written communication comes across cold or if there's misunderstanding of what is said, it has negative implications. Consider funneling and triaging requests through one channel, set clear expectations and do it well.
- At a time of crisis, speaking to real people is very important as it allows you as a brand to provide sincere reassurance to customers, make a connection that exemplifies the brand, be clear to customers of what they can expect in the coming days and ensure first contact resolution.

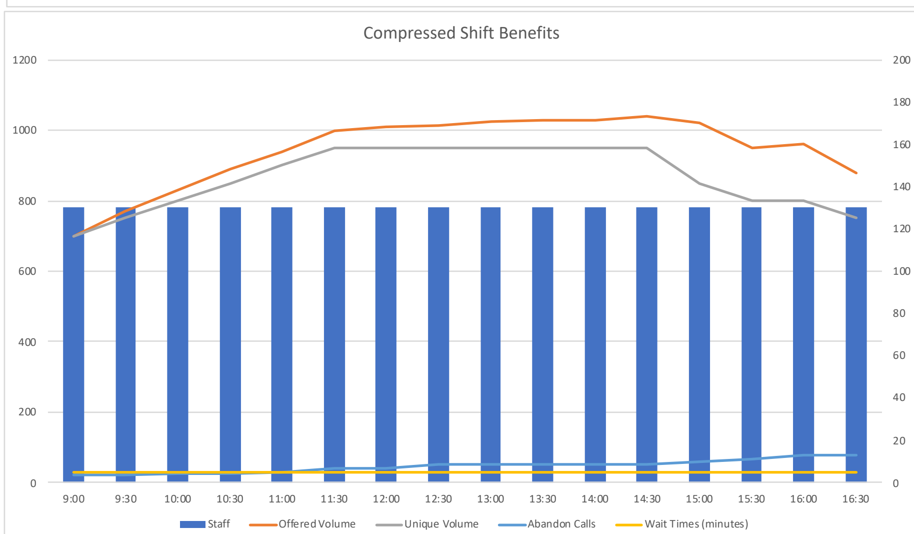
Intake Triage

- This is especially helpful for companies with limited IVR technology or as stop gap until IVR can be adjusted.
- Leverage less trained staff AND/OR 3rd party add on AND/OR corporate support staff (meaning borrowing employees from other departments to assist).
- These "pre-tier" team members can field simple as well as first calls, emails, chat and triage the more complex calls to more trained staff.
- While this is less efficient than having universal agents, it can take immediate burden of the limited trained staff while helping to thin the queue, lowering wait times.

Reduced Hours (for companies whose hours are longer than a single shift)

- While reducing hours can seem counterintuitive to customer service, in certain situations it can help by creating a greater overlap of staff to increase your capacity during the shortened hours. With high abandoned rates, it's not unusual for callers to be reattempting to call as many as 5-20 times, clouding true volume and crowding the queue, impacting wait times. This strategy may not reduce unique volume, but it does allow you to reduce repeat callers, thus improving service levels.





Reduce Outbound Calls

- When customers call and secondary contact is required, set expectations with the customer on how this information will be communicated. If it's one way, such as keeping the customer informed on status or providing a simple answer to an issue, suggest an email response back. If the response requires the customer to make a decision or it's a denial of a request, schedule time for a call back.
- Train your team to share a specific date for completion of a request. For example, "You'll be getting your credit card in 3 to 4 weeks". Is not a good strategy. Say instead, "You should have your card in your hand by April 3rd and can activate it through our automated system at 1-888-xxx". Set the date so you under promise and over deliver.

Bucket Mass Email Response and Closure (in conjunction with **Policy Lightening**)

- Identify issues you would be willing to resolve without the usual rigour and develop a new response template with the easy resolution. Leverage less trained, non-customer facing staff (or 3rd party or corporate staff) to mass respond and close cases (all at once if your tool allows or manually, if not).

Invest Now, Reap Later

- Increase AHT to show customers how to self-serve. This is a big tsunami which will subside only if you think long-term.
- Identify 3 or 4 high frequency inquiries or requests and make sure those are the ones that all team members validate with customers that they know what to do and how to do it. If there's a gap, then instead of using the 'reminder' tactic, take them to the site and show them how to log in and find this information. When a team member and a client work together to satisfy the customer's needs, there's a great sense of satisfaction for both parties.
- Train and coach your team members to be fluid in these 3 to 4 inquires/requests and you'll see a lasting reduction in phone call volume.

Make it a Partnership with your Team Members

- Ask them for ideas and input of how to increase capacity. When it's their idea, there's a greater commitment and better execution.

Channel Focus for medium to large multi-channel centres with good data

- While universal agent gain the best economies of scale, channel specific drivers may be better suited by having dedicated staff during certain intervals.
- Dependent on the data, look for
    - volume by interval to focus on different channels at different intervals
    - volume drivers that start in one channel and migrate after certain threshold
    - dedicate blitz staff on those channels at that time to stem customers who will channel jump causing multiple contacts
- Channel by urgency - Using IVR, push non-urgent volume to voicemail to email or straight to email where possible. This can allow use of less trained or service focused staff to handle offline.

HOW CAN WE DEFLECT OR MITIGATE VOLUMES?

Policy Lightening

- Relaxing requirements can reduce customer and employee effort.
    - Can shorten handle times (evaluate the trade-off meaning what is the cost to lighten policies vs the cost to continue at high volume and high handle times).
    - May allow for automation or faux automation (seems automated but may require manual work on the back end).
    - For faux automation, it allows you to leverage remote workers, 3rd parties, new hires, other employees in the organization.

Adding Forms

- Even if the choice is to use manual (faux automation), collect data needed to action an issue without live interaction (can be automated if you have the technology, time and budget).

Enrich Self-help Fast

- Publishing agent created help content and videos (medium depends on industry and call drivers). See also Pop Up sites answer.

Proactive Service

- Robocalls, outbound IVR, IVR recording changes, emails, SMS (in conjunction with policy lightening can have a big impact on volume).

Crowd Sourcing

- Leveraging online forum technology to allow customers to help each other (may be inherent in your CRM or use Pop Up sites).

Pop Up Sites

- (Wix or similar) can be used as a stop gap to add content and turn on features without heavy coding or development work.
    - Can be branded like your site and linked from your own sites help section
    - Allows for real-time publishing and feature add-ons by business owners

Prioritization

- Set expectations with customer as to the order of completing requests. Start with the most urgent, time sensitive issues first (e.g. customers whose issue is linked to a soon arriving date like travel booking or payment withdrawals).
- Adjust IVR and proactive messaging to communicate this to customers.

HOW CAN WE HELP OUR EMPLOYEES' WELL-BEING BOTH IN OFFICE AND REMOTE IN THESE UNCERTAIN TIMES?

Communicate

- The risk of over communicating is minimal relative to the risks of under communicating.
- For geographically separated employees, leverage tools like Slack, Facebook Workplace, MS Teams, Zoom video conferencing and more.
- Touch base at least daily and ideally more.
- Be TRANSPARENT. Honesty affords immense grace and understanding.
- Adjust expectations and show compassion. Change is a stressor that can cause anxiety which is compounded by concerns of health and financial stability. Don't sidestep this. Add it to the agenda!

- Create tools...they don't have to be pretty. Customers' needs are rapidly changing as is your policies and practices. Make sure you support your team by providing them with tools (scripts, screen shots, FAQ, etc.).

Delivery of Message

- It's not the just message, it's also the delivery. Stop communicating important messages through email.
- Use video, pick up the phone or face to face. You may be doing some of these already.
- Be clear and set expectations of your frequency of communication.
- Read the Harvard Business Review article, that is part of this package, on how to deliver your messages. It's short and to the point.
- Be confident in your delivery and use language such as, "Here are the steps we are taking" or "We also want you to have control and here's what you can do" to demonstrate action.
- Don't look stressed out - it trickles down to your team and ultimately to the customer.

Empower

- Things are changing too fast to account for everything. Communicate often and focus on high level outcomes (e.g. customer resolution vs tactics or mechanics such as saying a customer's name three times). Give your team permission to make decisions and improvise. The risks are small but restricting them comes with big risks to costs, turnover, and reputation.
- Make a point to highlight examples of agents improvising. Celebrate them. Tell stories in your daily huddles and meetings. Let them share too.

Training and Coaching

- Don't leave your team members to fend for themselves. High call volume means that leadership walks around. It feels like policing. Be in the moment virtually with them. Provide support for knowledge gaps.
- Provide training and coaching on how to increase FCR and relatedness on the phone. Train your leaders with a facilitation guide on how to do this to drive consistency across your organization. By delivering a powerful 15 minutes shows support and

provides value that will encourage your team members to want to come to work and will mitigate future escalations and call volume.

Recognize

- Now more than ever, we need to acknowledge the work our frontline is doing. They have the same fears as the customers calling and are dealing with heavier customer emotion and frustrations. They are tapping into their ambiguity tolerance BIG TIME. THANK THEM!
- Use high five coaching by recognizing the good things on their calls. Tell them daily by email or text or just pick up the phone and share. It doesn't have to be long (less than a minute). *"I really liked when you showed Ms. X empathy and a strong willingness to help when you said, "I know these are challenging times and I can see this from your perspective. I can definitely help you. Let me see what's possible*."
- Being specific is terrific! Share the skill and the positioning of what was done well. Connect to share the good and the not so good. The pressure is on and if you go to them only when mistakes have been made it just adds to the heaviness.
- Create an impromptu recognition program to capture the qualitative things that are happening. From putting in the hours to improvising with customers to helping each other out. These are BIG actions that need to be pulled out of the hum of the day and raised to the light.

Share publicly AND daily positive Stories about Customer Response and Team Member Effort

- Make it bullet point, short and sweet. Send out a short video using your cell. It's not about quality but more about staying connected and showing that you care!
- We are coming together as a community and that's a wonderful thing.

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