

# Contact Center FCR Best Practice Award Winner

## Award for Performance Management: Cogeco Connexion

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## **COGECO – Performance Management Best Practice Story**

It is not often - that we encounter moments in our business, in our collective experiences, in our lives – where we are genuinely struck with a real “Eureka!” moment. That time at which the proverbial forest is no longer lost for the trees, or where what may have been in plain view – was no longer obscured by the day-to-day operations of our existence. It can be argued that there are those rare companies which, through their tireless and continual efforts to innovate and remain cutting edge – experience these moments more often than us as individuals. And that may be true for some. While COGECO strives to be that company every day with exciting and revolutionary new product offerings, we have also most certainly experienced our own “Eureka!” moment this calendar year. Our own “A-ha!” moment – and what we hope will represent a real turning point in the evolution of our brand.

For COGECO, this moment was manifested through direct consultation with a small number of respected industry leaders, not the least of which – was the **SQM Group**. During a visit in January of 2015 – some of the obstructions in our path to this awareness were expertly isolated and revealed. We began a journey this calendar year with SQM – to help build a “Performance Management” platform that would best support these new revelations. Where old habits were discarded for new ideas; where the blur of old vendor-driven metrics like AHT were discarded for the clarity of the VoC (Voice of the Customer); where the proven science of Call Center Best Practices replaced the familiar trappings of an 80/20 culture – and our performances exploded. Please allow us this moment of clarity – where we are excited to share these recent remarkable outcomes with you!

Following these consultations early on, recommendations simply became calls to action.

### **Sales and Service**

Our performance reporting is updated daily and is accessible to all CSRs. We manage performance metrics on a monthly basis which is supported by our consistent behavioural coaching approach. Our metrics were adjusted this year to encourage and empower the CSR to focus on improving FCR, call resolution and CSAT. We recognize performance through monthly incentives and recognition programs, quarterly sales commissions, performance appraisals, and a yearly compensation bonus. Here are some specifics:

#### **Performance Reporting**

We provide a centralized scorecard that is updated daily for the CSR to access at anytime. This allows them to see progress and trending of their results, to identify their personal needs toward improvement. We communicate results to CSRs daily, weekly, monthly, quarterly, and yearly through various mediums. Of note: we have expertly integrated the actual comments of customers into our Internal Reporting, just as they see it in their use of the SQM Portal. This performance reporting provides the ability to determine the need for performance improvement plans. When a CSR or team is not meeting expectations for a set time frame, an improvement plan is put in to place to focus on improving behaviours through various coaching activities.

As part of this focused analysis of our performances, it was identified early in the calendar year that our Cu-Sat results required improvement. An intensive coaching strategy began.

### **Performance Improvement Plan Strategy / Intensive Coaching Program**

As a team, it was identified through SQM reporting and Supervisor feedback that a refresher workshop focusing on soft skills was needed to improve Cu-Sat and FCR. We partnered with our training department to develop and deliver a soft skills workshop consisting of 5 modules. The five modules included positive attitude, word choice and tone, dealing with difficult customers, listening skills, and positioning. We decided to conduct the workshops during team sessions to encourage team building through case study discussions where the CSRs can share their best practices. The 5 modules were delivered over a time period of 3 months to ensure there was ample time to practice the learned behaviour, review in coaching sessions, and be able to share their experiences in the next session. During the 3 month time period, we began to observe very positive soft skills as each module was delivered. The supervisors fully aligned with their coaching approach by using the SQM tool daily and providing consistent feedback and recognition for positive behaviours in Q2 and Q3 where we identified favorable SQM and FCR results. To support individual performance improvement plans, the supervisor's core function is to coach their agents consistently by using various techniques.

One-on-One Coaching – Once per month - 30-60 minutes in length where the techniques are taught, learned and practiced. This is where the focus area is created, developed, and changed, once mastered. KPI progress is reviewed; however, the bulk of the session is behavioural focused.

Side-by-Side Coaching – Once per month – 60 minutes in length where the Supervisor sits in with the agent, observes and supports the focus area and provides real-time feedback. Depending on the comfort level of the agent, the Supervisor will provide tips during the call to support the focus area of the agent.

Remote call monitoring/coaching – 30-60 minutes in length where the supervisor logs in remotely, listens for the focus area, and provides feedback through an instant message tool, side by side, and/or through the coaching journal by documenting the session. Depending on the comfort level of the agent, the Supervisor may provide tips during the call to support the focus area of the agent with IM's.

Self-Evaluation – 30-60 minutes in length where the agent listens to recorded calls to identify areas of opportunity related to their focus area. They are able to create statements to use on similar call types and allows them to self-reflect on their interaction with their customer.

Peer Coaching – 30-60 minutes in length where a successful agent sits in with an agent who is struggling on a particular step, in order to provide feedback and share best practices related to the agent's focus area.

Group Interactive Sessions – 60 minutes in length where 4-8 agents participate in a call listening session to review a technique and share best practices and ideas to support specific call steps.

Leadership through Walk-Around – Commenting on positive behaviours that are heard throughout the team row to encourage and recognize positive behaviours.

These various coaching activities are included in the creation of the performance improvement plan to cater to the need of the specific CSR.

## **Performance Appraisals**

This year we implemented the requirement to conduct performance appraisal discussions quarterly to review progress in KPIs and key competencies. This will promote the needs of our agents in a more regular interval. The need to balance our agent KPIs to increase the weighting of the VoC was determined in Q3, where we saw the consistent improvement from Q2. This is part of that continuing “Eureka” moment as described below:

The operational KPIs were adjusted to empower the agents to manage their time with the customer to ensure FCR, Cu-Sat, and our Sales requirements. This was well received by the CSRs as they felt we listened to them – and the change would allow them to spend the time with the customer that they have been asking for. Since implementing this change, we have maintained our Cu-sat and FCR results in to Q3 and Q4. As seen above in the final months of this calendar year – **To help extend the improvements into our new Fiscal Year, or Q4 of the SQM calendar year – an historic change was undertaken – the complete removal of AHT from agent-level KPI’s and Performance Appraisals!** This was representative of the same “culture shift” in our Performance Management approach, which similarly took place in our Technical Support / Customer Experience group.

## **Bonus and Recognition**

We celebrated our “Highest Customer Satisfaction Award” in both provinces to thank every employee for their combined efforts in winning. Every department provided their appreciation to the CSRs and their contribution to the success. The Esat was amazing during and after this event as they felt appreciated and very proud to have won this award. The CSRs received a special recognition gift, and participated in an enormous BBQ hosted by our special events team in honour of the CSR award; a candy bar was created to highlight the award - referencing the “sweet” way we treat our customers. To top it off, individual agents were recognized with their SQM World Class Certificates – in hosted Celebrations with our Executives. Pictures were posted on various mediums throughout the company. This type of event creates amazing morale and really brings back the reason we are all here – to ensure the Satisfaction of our Customers.

Also new this calendar year – We now recognize our CSRs that are trending as World Class throughout the year, through the launch of our “World Class Trending Recognition Program”. This program includes both provinces for both Sales and Customer Experience Call Center Departments. It provides ongoing recognition monthly by awarding agents with certificates that are trending to World Class. We also award 1 trophy per center to the top performing CSR who is trending with the highest World Class score.

We built an internal SQM Site/Portal that showcases the awards we have won over the years, containing the specifics of our World Class Trending Recognition program/results, as well as the CSRs that have already achieved World Class Certification. This portal is updated every month and communicated to the CSRs to highlight achievements and trending results. The results of this new program in Q2 speak for themselves!

## **BONUS**

As a final means to encourage our teams through our Performance Management strategy, there are two monetary programs in place to further inspire and incentivize. The first one is a quarterly monetary bonus/commission program to drive Sales Performance. The second one is a yearly bonus program to compensate the Performance Appraisal results, which drive our overall KPI performance. Both programs create incentive and encourage agents to utilize the behavioural sales approach which focuses on the customer relationship to close sales. The key to success is to consistently sell products once the initial reason for calling is resolved. Our branded 'Cogeco Selling Approach' encourages this behaviour to build trust with each customer. A good understanding of the customer's household is important to recommend the right products for the needs of the customer. The CSRs who consistently follow these proven techniques are the most successful and receive a higher percentage of the potential sales bonus program. The CSRs who follow this method are also the most successful in Cu-Sat and FCR metrics as it focuses on the balanced approach of handling the needs of the customer, building relationships, and ensuring their concerns are addressed as quickly as possible.

## **FCR Centric Technical Support**

As part of our journey in going "from good to great" with our Customer Experience at Cogeco, Technical Support Ontario also began its transformation of moving into an FCR centric call center in late 2014. Also inspired and invigorated by the SQM team visit – where a review of our unique environment in Technical Support took place – we were provided with several recommendations around how we were managing our Customer Culture – and decided to turn those revelations into our opportunities.

When we talk about a change in that culture – in our shared moment of clarity – we responded with a dramatic change to our Performance Management culture. For the first time in COGECO history, we now have now made CALL RESOLUTION our highest weighted metric and KPI. We will go into detail regarding the outcome of these transformative changes.

## **Performance Management**

Very Similar to Sales, and in recognition of our need to improve on CSR delivery and soft skills, we ensured that all of our agents participated in our 5 module-based, Soft Skills Training Program. This training occurred over several months and was completed in July 2015. It laid the foundation for what would become our ultimate evolution to a truly customer-centric environment.

## **Evolution of Call Performance**

One of the early recommendations we received, was to review our existing call flow to ensure we were rewarding the agents for Good Customer Experiences - and not just being focused on following our Internal Processes and Procedures. To do this while placing the team through soft skills training, we made sure to integrate a soft skills (communications) component to our call flow. We also moved away from our own internal "partial scoring" to ensure Resolution and Expectations within the call flow. We launched these changes in March and scored the call flow both ways (old call flow vs. new) for 2 months

before going live in May to allow agents the time to adjust and transition into the new expectations. Doing it this way also gave us buy-in with the employees as well as time for them to see any changes.

### **The “Eureka” Effect – Step 1 – The “FCR Project”**

Some of the impetus for our corporate transformation regarding the integration of the VoC, was brought about internally through a Brand-Level Evolution project team, headed by POE Director, Sabrina Holgate, and supported by our Workforce Manager, Nick DeNapoli. The “FCR Project” was born – and the focus on Call Resolution Metrics became forefront. We had never had a belief in our attempts at internal reporting of FCR, but with the support of SQM and the development of sound methodology to capture Contact Resolution through our FCR Project team members, new analytics were developed in-house as supplemental reporting to our SQM Performances. We were going to set an aggressive goal of 5% improvement in our SQM FCR metric – and our investment in this new set of reporting will help us to identify key areas of opportunity internally. Let’s face facts – we had begun to completely revamp our “Performance Management” systems, in order to support this ambitious goal.

### **The “Eureka” Effect – Step 2**

In April, we began assessing the possible changes to the new Agent Scorecards for our new Fiscal Year, which begins in September. Through the engagement of our Performance and Organizational Efficiency (POE) group – and in understanding the need to drive the emphasis on performance through Call Resolution, we recommended having it as the highest weighting for any of our KPIs. We settled on a 25% coupling of Call Resolution – with our 20% CSR CSat (Cu-Sat) metric – thereby ensuring the combination of these 2 customer-centric metrics were the dominant component of all of our KPIs. The VoC would now represent nearly half of our Performance Management Strategy. In Quebec, this weighting is actually 50% of the overall Performance Management of our staff! In both instances, we set our targets for the year using the expertise of our VP of Client Services, Nader Ghattas – who advocated that we use existing performances to establish new baselines for those agents who are over achieving, achieving, and needing improvement. Through a recognition of the impact this complete culture change would have on our workforce, it was agreed that these changes would be visible for the first 2 months of the Fiscal Year to our agents – promoting their engagement and familiarity with the new metrics – and we would only begin to ‘count’ these metrics for them in November. This change – this “A-ha!” moment - became the groundwork for our FCR Sessions - hosted by POE, our Operations Leaders, and our Customer Satisfaction SME, Frank Morell.

### **The “Eureka” Effect – Step 3 – FCR Information Sessions!**

As part of the proposed changes to our KPI Scorecards for our agents, we embarked on a Mission Delivery platform – to visit and speak with agents through all of our Technical Support Sites, internal and external – to share the benefits of this new strategy with them. We used SQM data, provided the how’s and why’s to incorporating FCR, Call Resolution – and the differences therein – and promoted the fair use of these metrics, by implementing the proven SQM model of establishing baselines for expected performance of any workforce undertaking this monumental shift. The buy-in was outstanding! Our people were invigorated. Forums for discussion were opened up, and the support began pouring in. They felt as though we were listening to them, just as was heard in Sales – where through a focus on the

customer and the outcome of the contact – we were truly beginning to reward them for the right behaviours. The numbers we've achieved since launching have spoken for themselves!

#### **The “Eureka” Effect – Step 4 – Workshops, Incentives, and More!**

Off the strength built up around this official change to our Performance metrics in September, we have also launched several supportive initiatives that have continued the momentum into a record December. We have our FCR Incentive program for all of our Technical Support agents, as well as an FCR Workshop for exposing opportunities and successes. It's really helped create an even bigger lift!

#### **PROVEN RESULTS**

Our internal Reporting of Call Resolution and FCR are also showing growth, however – the SQM results really do speak for themselves – with the largest sustained gains for Technical Support in the history of our SQM Performances.

#### **CLOSE**

We are ecstatic regarding our recent evolution. The performances of both our Sales and Technical Support channels continue to rise – and our Executive team is noticing. There are several new “Performance Management” initiatives to come, including a matching “No AHT Pilot” for our Technical Support group that is already proving to be as effective as it has been in Sales – an identification of our leading opportunities that remain, through our robust and proven “Root Cause Analysis” platform – and a continuation of the core concepts we are learning in partnership with our most prized partner.