



# How voice of the customer can **transform performance** in the contact centre

Best practice for using customer feedback to create a robust framework for measuring, managing and rewarding agent performance in the contact centre.



## Introduction

The landscape of customer feedback has changed dramatically over the last five years. New technologies have revolutionised the way we gather customer comment, making the process more immediate and the insight more intelligent. Companies increasingly place customer feedback at the heart of their operational improvement programmes, using it to streamline process, reduce complaints and re-engage with customers.

Technological advances in customer feedback have also coincided with a desire for significant cultural change in many organisations (sometimes prompted by regulators, sometimes by a genuine desire for a different approach). This has resulted in a shift away from traditional operational efficiency metrics (FCR, AHT) and sales-based incentives towards performance management programmes based on service. And this is where the most significant application of new customer feedback mechanisms has come into play – using the voice of the customer as the key metric to manage and reward agent performance in the contact centre.

In this paper I explore this phenomenon and offer some personal thoughts on what I think constitutes best practice.

## Acknowledgements

Thomas Cowper Johnson began his career in the research team of the London office of ad agency Doyle Dane Bernbach. After 14 years on the agency side of the fence he joined Norwich Union (now Aviva) where he established and ran their brand marketing team. He has since advised UK companies on their brand and customer strategies and is a founder director of Davies Ltd.

Davies is the leading solution for post-transaction IVR, SMS, Web and Email surveys in the UK, capturing immediate and actionable ‘Voice of the Customer’ feedback. Davies is used by many of Britain’s leading businesses to: gather objective feedback metrics that are used to manage and reward call agent performance; track and benchmark KPIs such as Customer Effort, NPS and Customer Satisfaction at key points on

the customer journey in order to improve the customer experience; re-engage in real time with disenchanted customers to improve brand advocacy and reduce complaints; fulfil regulatory and compliance obligations.

## Why customer feedback works for managing agent performance

New survey technologies offer opportunities undreamed of by traditional research practitioners: real-time capture of voice of the customer; immediate transcription of audio files to text; instant alerting based on trigger scores or words; online reporting that tailors the display of results to the audience – brand, site, team or even individual agent; and all on a scale that allows companies to build robust sampling at an individual adviser level.

At the same time regulators, media commentators and public opinion are encouraging companies (especially in financial services) to move away from traditional sales-based reward models that can result in customers buying products they neither wanted nor needed. Research suggests that improving customer experience and customer satisfaction is now the most pressing strategic imperative in UK contact centres. Businesses are seeking new ways to manage and motivate staff to deliver better service and are increasingly finding that Voice of the Customer (VoC) has an essential role to play. VoC contributes on many levels.

**VoC feedback is meaningful** - It moves the measurement framework away from purely efficiency-based metrics (such as speed of response, FCR or AHT) to feedback on performance from those who actually experienced it. While simple efficiency measures have a place in the contact centre their relevance to adviser performance is questionable.

We now know that customers will accept a longer call-wait time if they can get through to an adviser who will answer their query first time round. Equally we know that a longer call can result in a customer whose engagement with (and value to) the brand has been substantially enhanced. Efficiency metrics cannot bring to light customer issues in the same way that VoC does.

**VoC feedback is robust** - With VoC performance management can be based on the views of thousands of customers rather than a handful of quality controllers. ServiceTick runs one of the largest VoC programmes in Europe which collects some 2,500 pieces of feedback every day. The sheer diversity of opinion and language gathered by a substantial voice of the customer programme builds a far richer picture than can ever be achieved by a single team leader or quality controller. And survey volumes deliver sufficiently robust samples to allow nuances of performance to be identified at agent level.

**VoC is authentic** - Views expressed are first-hand rather than an interpretation of what a customer was trying to say. Call quality monitoring is an effective but vulnerable process, subjecting agents to a third-party interpretation of how the interaction with the customer played out. With 'Voice of the Customer' performance is measured by the personal account of the customer who was on the receiving end of the service experience. Nothing is more powerful as a training tool than hearing the words of the customer, spoken by the customer, describing what went wrong or right.

**VoC is fair** - Customer feedback is gathered continuously so adviser performance is measured and managed continuously. This allows peaks and troughs of performance to be ironed out and avoids the risk of a snapshot of performance coinciding with an adviser's off-day. It also allows managers to build up a view of how feedback on adviser performance is influenced by process or product issues (it's our experience that agents always score lower when handling processes such as an insurance claim or policy cancellation than when taking out a new policy).

**VoC is relevant** - At a time when brands are looking to build loyalty through more emotional engagement with customers, 'Voice of the Customer' offers unparalleled insight into behavioural drivers. At one level the mere act of asking for feedback creates an opportunity for dialogue that will deepen the relationship. More importantly the open-ended nature of VoC, linked directly to a recent engagement with the brand, gives a true picture of how customers feel about each 'moment of truth'.



## Which survey methodologies work best for gathering customer feedback?

Different survey methodologies will produce different results so choosing the right survey process is essential for agent performance measurement. Managers will want to be able to generate insight that is:

**Immediate** – while the customer’s experience is still fresh in the mind. Real-time feedback provides more detail and precision about what went right or wrong and is more likely to include suggestions on how to fix things. The longer the delay between transaction and feedback the greater the risk of a drift towards lack of clarity and neutrality of sentiment.

**Accessible** – results need to be disseminated as swiftly as possible to those responsible for managing performance – the team leaders

**Granular** – you will need to measure KPIs at agent level in order to use them as an indicator of performance.

**Robust** – for benchmarking over time and with their peer group you will need to achieve a minimum number of surveys per agent per week/month. This has implications in terms of affordability.

Given these requirements there are really only three candidate feedback channels for gathering feedback for agent performance management – SMS, email or post-call IVR survey.



**SMS surveys** can deliver timely response but they are restricted by the number of questions that can be asked and the fact they can only be delivered to mobiles. Most customers will only have the patience for answering two to three scale questions and a verbatim via SMS – which may not be sufficient to gather all the information you need for measuring agent performance. Moreover not all calls to contact centres are made via mobile. Landline can account for 40-60% of all calls and SMS cannot be used with these customers.



**Email surveys** can give you granularity and a robust sample and they certainly have the edge in terms of cost – but not necessarily value. You will have a phone number for the customer who telephones your contact centre but not necessarily an email address; so, from the outset, you will be restricting your sample size and possibly creating bias. Email surveys mean delay between customer contact and issuing a survey request, so there is no chance for real-time feedback. And email surveys are not always answered immediately. Roughly 50% of email-based feedback is delivered on the day the email was sent but up to 1 in 6 responses can be returned over a week later. These delays will impact the quality of response you receive.



**Post-call IVR surveys** give the best results when building an agent performance management programme. IVR surveys can be delivered immediately after the interaction between agent and customer, while the experience is fresh in the mind of the customer. Feedback is more accurate and verbatim comments more instructive about what went right or wrong. Overall the quality of the feedback is better and the insight derived more valuable.

There are two delivery options for post-call IVR surveys – agent-initiated transfer and outbound call. In the first the agent invites participation in the survey and transfers the caller into the survey at the end of the call. While there can be a risk of agents cherry-picking calls, giving agents the opportunity to invite customer participation creates an atmosphere of trust rather than suspicion. By introducing the advisor gently to the concept you can soon gain acceptance of the principle that the company will use independent customer feedback to measure performance.

An increasingly popular option for measuring agent performance is the outbound IVR survey. In this scenario customer data is gathered by the client and used to initiate a call to the customer after their transaction. When answered the survey is introduced with a pre-recorded welcome before the questions are delivered.

The outbound IVR process removes any risk of agents influencing which calls go through for survey. It also facilitates the delivery of a set number of completed surveys per agent over a given period – ensuring that the framework for agent performance measurement is fixed and fair. As with the agent transfer model, surveys can deliver a range of questions with a logic flow based on the answers that each customer gives.

Whichever the delivery option IVR also has the added advantage of letting team leaders replay the actual customer comments when coaching agents. Never underestimate the power of listening back to the voice of your customer.

## What questions should you ask?

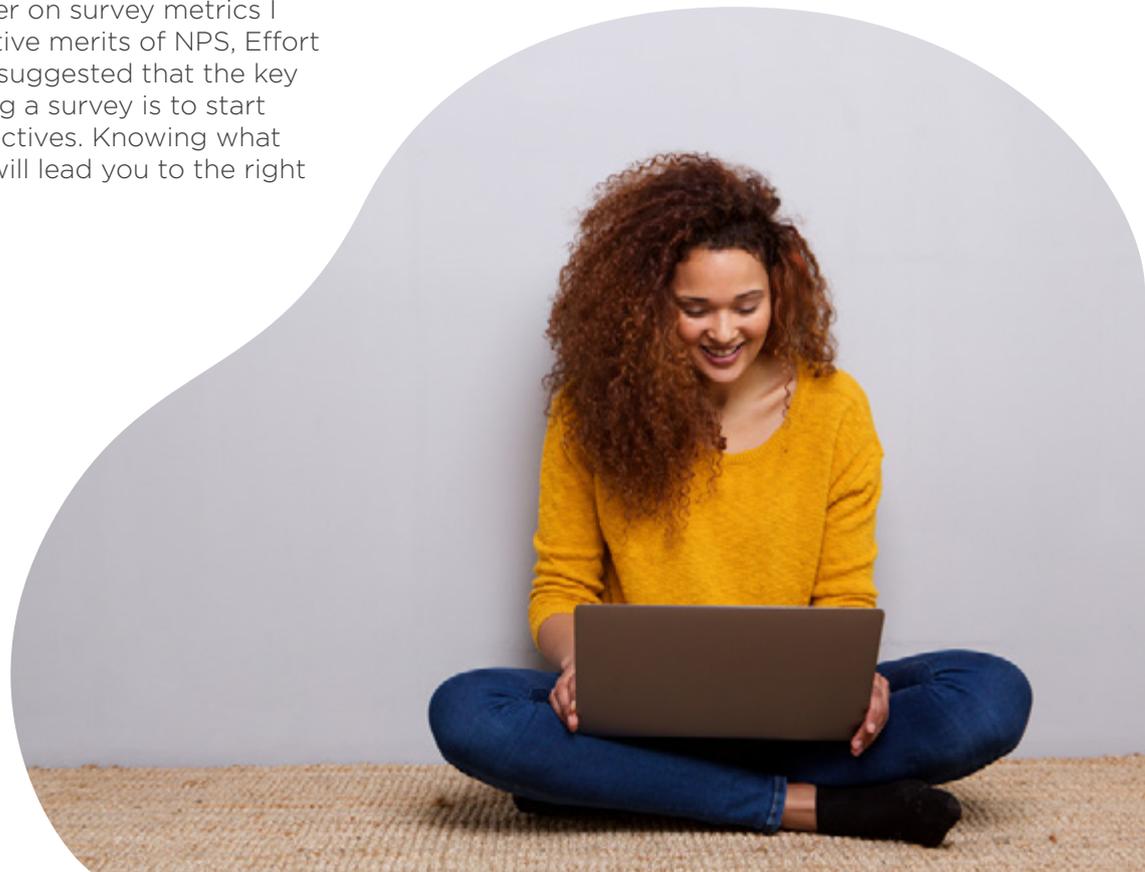
IVR surveys offer immediacy, impact and measurement at an individual level. However IVR surveys also have an optimal length – the most effective surveys will run to about six or seven questions with the last question offering customers the chance to leave their own comments. With only a handful of questions to play with what should you be asking?

In an earlier white paper on survey metrics I considered the respective merits of NPS, Effort and CSAT questions. I suggested that the key for anyone constructing a survey is to start with a clear set of objectives. Knowing what you want to measure will lead you to the right way to measure it.

In an IVR survey it is possible to construct a survey that effectively interrogates process, brand relationship and agent behaviours. One question on effort, two questions on agent performance, one on NPS, ending with a verbatim prompt is a neat and comprehensive solution. If additional agent performance behaviours need to be probed surveys can be structured to offer questions on an alternate basis.

Thus respondent 1 will answer questions A & B about an agent's performance and respondent 2 will be presented with questions C & D. By alternating four different question wordings across the two opportunities for questions on agent behaviour a richer picture is built.

Using a range of different question types encourages respondents to consider different aspects of their interaction. If the whole survey asks solely about agent performance there is a risk that customers fail to distinguish the meaning behind different questions and mechanically press the same score for each.



## Four common mistakes to avoid when using customer feedback to measure agent performance

With the exception of the verbatim prompt all these questions seek to reduce the totality of customer experience to a set of numbers. There is clearly benefit in a 'one-number' solution (easier for identifying trends, employee engagement, board reporting) but there is also inherent risk.

Any survey process can be manipulated to deliver a higher NPS or Effort or CSAT score; but a measurement system that leads to reward must seek to reduce the scope for 'interference' or misinterpretation to the point of statistical insignificance. Here are four golden rules to prevent criticism.

**Be Consistent** - Survey results can be influenced by the smallest changes. Delay between the transaction and the timing of the survey delivery, the channel in which you survey (email/IVR/SMS), changes in question order and even the rewording of individual questions can all affect results. When designing a survey for managing agent performance get agreement with all stakeholders on the survey structure and rules for delivery before you start. If you do have to make changes to the survey run an A: B test to identify the impact of any changes.

**Customer touchpoint** - Different touchpoints on the customer journey tend to produce different results. For example a customer who has just bought your product is likely give a higher NPS than one who has registered a complaint. If you operate multi-skilled teams in your contact centre, make sure they have an even spread of responses by touchpoint (or introduce a weighting factor that takes account of the overall results at each point of the customer journey).

In doing so remember that customers are adept at distinguishing between a good agent and a broken process. Questions about agents will reflect the efforts they have made even where a broken process has left a query unresolved.

**Cherry-picking** - I explored earlier the options for delivering IVR surveys including agent transfer, integration with telephony or outbound surveys. Agent transfer is the most commonly used process because it is simple to implement and generates higher response volumes. However it is open to the criticism of 'cherry-picking' - where an agent selects which customer is invited to participate based on how the call went.

Concerns about cherry-picking suggest a level of mistrust between contact centre manager and agent. Our experience is that building a culture in the contact centre based on the public celebration of positive feedback rapidly creates an acceptance of the survey process. In this context the occasional piece of negative feedback is seen and welcomed as constructive criticism. There are more mechanical ways of monitoring and managing cherry-picking that will very swiftly expose those who try to manipulate the system but, in our experience, trusting your staff to engage with feedback is a far more productive approach.

**Single-minded measures** - If using post-call surveys for managing agent performance be clear on the measures you are using and reflect this in the questions you ask. You must avoid confusing customers with the wording of your question. Take, for example, what at first sight appears to be a simple question: "How satisfied are you that the agent you spoke to was professional and resolved your query?" Is this a question about agent professionalism? Or query resolution?

How would the customer respond if the agent had been professional but, for a reason outside their control had not been able to resolve the customer's query? Customers who are confused by questions are more likely to put the phone down on your survey. The golden rule is one measure per question.

## Five ways to ensure voice of the customer improves agent performance and motivates the team

Voice of the Customer is a powerful tool for managing service performance, improving process and even changing the culture of an organisation. However, like any measurement framework, it can prompt suspicion and mistrust on the part of those being measured. To be successful a 'Voice of the Customer' programme must be introduced in a way that encourages the engagement and support of the whole contact centre. And once launched it must continue to garner the support of those at the sharp end. Here are five ways to make sure that VoC can improve agent performance and motivate your team.

**Bring your people with you** - Without the engagement of your teams a measurement programme based on VoC is unlikely to succeed. From the outset you need to be open and honest about your objectives, how you plan to use the data gathered from customer feedback and what it means for each agent. You need to demonstrate that the process is universal and fair. Constant communication is essential.

And we would always recommend that you use more carrot than stick - in the early stages of a feedback programme agents will respond positively to the programme as a whole if you celebrate their successes rather than berate their failures. You should also ensure that the customer feedback is readily accessible by team leaders and even individual agents. Making the feedback freely available removes some of the suspicion. It also means that continuous action plans can be developed for each individual without waiting for a cascade of information.

**Identify and clone best practice** - as well as identifying development needs for individual agents a VoC programme will also identify your high performers. By studying their approach and the way they deal with customers you can rapidly identify best

practice. This can then be cloned across the teams (although care should be taken not to impose a 'one-size fits all' service model).

**Coach in the moment** - real-time feedback has revolutionised performance management in the contact centre. By targeting alerts (that are triggered by a particularly poor or excellent service experience) to named individuals, team leaders are made aware of a piece of feedback that can be used to coach an agent 'in the moment'. The ability to replay a customer's feedback within seconds of a transaction taking place means success can be celebrated or failures rectified while the experience is still fresh in the memory. This opportunity to 'coach in the moment' creates an unrivalled learning experience for both agent and team leader.

**Tap into human nature** - within all of us there is a competitive streak that can be tapped into to drive improved performance. The most obvious manifestation of this is benchmarking. Comparing an agent's KPI scores over time or contrasting an individual's scores against the rest of the team lets you build a healthily competitive environment in which improvement is stimulated. Companies have different views about the wisdom of publishing league tables of performance but, used in the right way to reward success with prizes or recognition, they can stimulate significant improvement.

**The aggregation of marginal gains -**

business leaders have traditionally pursued the ‘paradigm shift’, the one great leap forward that will transform their business. But in 2012, at the London Olympics, we were exposed to a new approach to performance improvement. Led by Sir David Brailsford, the Team GB cycling team returned a record haul of 12 Olympic medals (including 8 golds). Brailsford attributed the success to a philosophy of ‘marginal gains’, summarised in his own words:



“ The whole principle came from the idea that if you broke down everything you could think of that goes into riding a bike, and then improved it by 1%, you will get a significant increase when you put them all together ”

**Sir David Brailsford**  
Team GB cycling team

This is an approach that we believe is particularly relevant to improving customer experience. A field where significant gains in performance are hard to come by lends itself to ‘marginal gains’. Improving by 1% each agent’s ability to listen, understand, be helpful, be friendly and resolve a customer’s query will, over time, bring about a significant increase in customer satisfaction.



## Using voice of the customer to provide a robust framework for reward and remuneration

Customer feedback offers significant advantages for measuring individual agent performance but should not necessarily be the only type of metric to be applied. For a fully rounded picture customer feedback should be used alongside other contact centre metrics to create a 'helicopter view' of performance.

The ideal is to create a basket of KPIs that drive improved performance but do not suffer from the law of unintended consequences. Human nature being what it is agents will perform in a way that drives up the score of whatever measure they are being evaluated against. Measured on sales, they will sell more. Measured on Average Handling Time they will seek to trim the amount of time they spend listening to and understanding customers' issues. Measured on First Call resolution they may spend too much time trying to resolve a query. There will always be occasions when these metrics work against the best interests of the customer.

Similarly, observed behaviour (such as is used in quality monitoring) may lead to a false impression of agent performance. If they know they are being monitored agents will make greater than usual efforts to present a good telephone manner, to follow the agreed script or procedures or to demonstrate professionalism.

Whatever metrics you use to manage agent performance be sure that they are within the gift of the agent to influence. Efficiency measures such as system availability and cost per call are clearly not within the scope of agents to influence. Channel measures such as first call resolution or transfer rate may offer a recognition of agent knowledge. Feedback measures focused on the agent performance will certainly be a reflection of agent performance.

The aim will be to build a scorecard that works for your business and the same rules cannot be applied across all sectors. However you make up that scorecard please remember the golden rules that go into a successful agent



remuneration programme:

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**Make sure your samples are robust** – each agent needs to have sufficient pieces of feedback across a given period to ensure a single voice does not unduly influence the result. This may mean rolling up surveys and results over a longer time period.
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**Make sure your sampling points are fair** – different touchpoints produce different results. Ensure each agent has an even or weighted representation by customer journey touchpoint.
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**Make sure your survey works** – keep it short and clear. Avoid questions that ask about two behaviours and focus on those behaviours that matter to you and your business.
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**Make sure you bring your agent teams with you** – don't impose a solution from above. Work with your agent teams to find a solution that they are happy to engage with.



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