What Call Centers Need, According to Top Experts

Proven call center experts share their
top tips for call center success

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Over the last few months, we've had the privilege to tap into the minds of proven contact center experts for Q&A sessions where they shared tips they've learned over the combined 50+ years of experience in the field. In this document, we've wrapped up a high-level overview of the key takeaways from these discussions. Tap into these leaders' expertise to help transform your own contact center and achieve your organizational goals.

Why customer journey mapping matters more than ever

Organizations are prioritizing improving CX. Most of the organizations Sumita has worked/consulted for have had a very deep focus on customer experience. And those who didn't start with that focus eventually got there, she says, because of the challenges they were facing.

At her current organization, a separate department that focuses only on customer experience was created. They look at customer interactions and map out customer journeys to determine what makes or breaks the customer experience. From there, they identify where these moments are in other parts of the business and gather further feedback from customers.

Expert Contributor:

Sumita Mullick, Vice President of Customer Service and Operations Analytics at Wellmark Blue Cross and Blue Shield

Sumita is a business transformation leader with global experience in crafting and leading strategy to improve business outcomes, enhance customer experience, and accelerate growth.

She's an experienced leader in the space of business operations and digital transformation with in-depth experience in a global, multicultural, matrix organization with a great track record. She has proven ability in leading large P&L, transformation strategy and digital shift by leveraging technology led modern ecosystem solutions. Sumita also served as a C-suite level partner and influences, manages, and mentors senior executives through technology and organizational change management.

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Customer journey mapping is the "missing piece" for enterprises when it comes to customer experience

When enterprises talk about customer experience, they often only look at customer service and the call center. This is only a piece of the puzzle, and isn't telling the whole story.

"For you to measure your end-to-end customer experience, you have to look at the end-to-end journey that the customer goes through," says Sumita. Customer journey mapping involves mapping out the touchpoints of a customer's journey, starting with the very first interaction. This could include the first time they visit your website. Or their shopping experience … a payment transaction … or any touchpoint they have with your brand.

When companies don't invest in mapping the customer and business journeys, they miss out on identifying the real points of inflection.

Experts at McKinsey say that personalization can lead up to **30% uplift in revenue and retention.**

Data can help you identify opportunities for CX improvement

When trying to improve CX, Sumita says to look at your interactions with customers and escalations data. "We as organizations need to be listening to what the customer is trying to tell us," she shares.

This means looking at why customers are contacting you, as well as the feedback they provide. If customers often contact you looking for specific information, perhaps you can improve CX by proactively providing this information as a notification, for example. Or if you're suddenly getting a large call volume related to one aspect of your business, that tells us that it's time to look deeper and consider how we can change or evolve the business to better meet customerexpectations.

Data doesn't only pinpoint the "bad." It can also reveal your strengths — things about your service that your customer likes and appreciates, and that you should continue offering. Your customers are sharing it all — the good and the bad — and companies that turn all that information into action will add immense value to the business.

Each year, $35.3 billion is lost by U.S. businesses due to customer churn caused by avoidable CX issues. (CallMiner, 2020)

At the end of the day, customers want these three things

"If we keep those things as the focus when we are designing our strategy, I think it will help us provide clarity and where we want to invest and how we want to invest," Sumita says.

Investments like Glance's Guided CX can transform customer interactions by putting you right on your customer's screen when and where they need you most. It can lead to faster, better service that's better for the customer, the agent, and the business.

91% of customer service leaders say that customer expectations are now at an all-time high. (Hubspot, 2022)

When it boils down to it, Sumita says there are three things customers want:
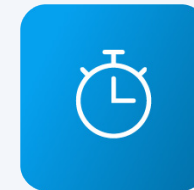
For you to respond to them quickly, when they want, and how they want

For you to respond accurately

An ease of doing business with you

Watch our discussion with Sumita >

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Leading contact centers with empathy for transformational CX

Empathy is a word that gets thrown around in CX a lot — but what does it mean to lead with empathy? It can't be found in specific scripted words and phrases. It's not just up to the frontline call center employees. Empathy must permeate throughout the entire organization. It should be found in the employee experience, customer experience, and in the brand promise.

Here are some ways CX leaders can bring more empathy into the contact center.

Expert Contributor:

Ben Devey, Director of Customer Experience at Ollie

Ben got his start in customer experience and contact centers at 18 years old, where he worked as an inbound customer service agent and then promoted his way into management.

At Ollie, he built a contact center, and now creates processes and tries new strategies. He manages everything with voice of the customer with a focus in direct-to-consumer services. He deploys strategies that embrace the latest contact center technologies and enhance the customer experience such as:

- Developing processes to listen to the voice of the customer, with a focus on direct-to-consumer models.
- Creating customer journey maps to identify areas of friction for the customer.
- Leading with a culture of empathy in the contact center.

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Invest in the employee experience (EX)

Companies that extend the brand values and brand experience to the contact center space deliver great customer experiences and alignment.

If agents are using antiquated systems, they're unable to deliver great experiences. They may be inefficient and frustrated, which is passed along to the customer. Investing in the right tools and technology better equips agents to do their jobs well, improving the employee experience and the customer experience.

In short, happy agents = happy customers. Investments like Glance's Guided CX can help both agents and customers by putting agents right on your customer's screen when and where they need you most. It can lead to faster, better service that's better for the customer, the agent, and the organization as a whole.

70% of consumers say they are likely to shop "exclusively" with companies that understand them.

Know that the call center is more than customer service

"I love it when we think of our customer support as an extension of the brand and the brand voice," Ben says.

While key metrics like Call Handling Time (CHT), First Call Resolution (FCR) are important to track; they don't tell the whole story. CSAT and NPS dig a little deeper but still aren't comprehensive.

You can't hang your hat on any one metric because the call center can offer so many different benefits when done well. Obviously, it can resolve customer issues, but it can also reduce customer effort, boost customer lifetime value, improve customer retention, and build loyalty. Plus, the call center is a gateway to the voice of the customer, with powerful insights that can inform the entire product/business.

Lead with empathy (and fun!)

Customer support groups often have to clean up mistakes that are made earlier in the digital journey or product while trying to retain customers. It can be challenging, and leading with empathy is vital and affects the entire company culture.

That last bullet point is easy to overlook but valuable. Customer service teams can deal with very stressful situations, but Ben's advice is to remember to make it fun. "When you're having fun with your team, and you've got people smiling, there's great energy … it's really important," he says.

Some ways to lead with empathy include:

- Know that as a contact center leader, you're a voice for your organization
- Advocate for your team
- Professionally communicate what you're team is experiencing
- Listen to agents — ask what type of calls they're struggling with and try to solve for those calls to prevent them from occurring in the first place
- Make it fun!

Pay attention to every part of the customer journey

Ben regularly goes through his company's — and his competitors' — chat flow, text flow, email flow, and calls in. His agents always know it's him who's calling, but this allows him to regularly check if things are flowing the way they should or if changes need to be made.

"Sometimes I think we set up stuff and forget about it. A small change could impact the customer flow, and you want to catch it before your customers," he says.
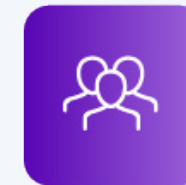
Being diligent and ensuring the customer experience is smooth — no matter where they're coming from (desktop, mobile, video, etc.) — is essential and requires regular "maintenance" or check-ins as the business evolves and changes.

# Address issues to avoid "death by a thousand papercuts"

It's easy to think that some of these customer experience efforts are inconsequential or minuscule, but they add up. If one customer calls in with an issue, there are probably 10 others like him that had the same issue but chose to remain silent. The same goes for employees—several may be experiencing an issue that one brings to light. Neglecting one instance may be somewhat insignificant on its own, but these issues add up and can lead to "death by a thousand papercuts."

One challenge Ben presented was to consider how you can make your customer experience projects just 1% better. Focusing on these small wins can yield big results over time.
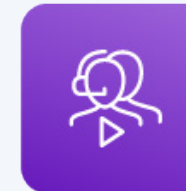
88% of consumers now consider the experience a company provides to be as important as its products and services. (Salesforce, 2022)

What tips/recommendations do you have for enterprises looking to improve customer experience?

Pay attention to your employee retention/EMPS scores
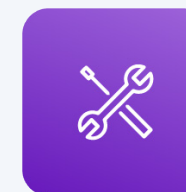
What is day to day like? Do they have the right tools?

All of these things impact the agent and the customer

Watch Ben's on-demand webinar for more >

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Effortless digital transformation: Leading with process & technology

KT said that the term "digital transformation" sounds powerfully overwhelming, but that it doesn't have to be. In fact, they said a change that takes only a few hours can make a huge impact. The key is to step back and look at the big picture. New technology may or may not make sense for your business. Align everything to your CX goals, invest in the right tools and technology, and watch every effort — no matter how large — make a big impact.

Expert Contributor:

KT Ellis, Senior IT Product Manager at Dutchie

KT has been working to support CX organizations for over 20 years, mostly in the SaaS space. Their focus has always been optimizing processes and technology to help teams grow and scale.

In their current role at Dutchie, they act as a strategic partner, leading system/capability roadmap planning and using data to tell stories and make decisions. They partner with business leaders and the engineering team to drive improvements, automations, and enhancements and actively look for ways to scale. In every interaction, they strive to actively listen, surface disconnects, re-frame problems, and push boundaries.

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A digital transformation doesn't have to be a major overhaul

The term "digital transformation" sounds powerfully overwhelming. But it doesn't have to be.

Some changes — like implementing a Glance Guided CX solution — can take just a few hours and make a huge impact.

It's also important to understand that the CX digital transformation doesn't start and end in the call center. Every part of the business contributes to the customer experience. No matter what your role, your actions create the customer experience. Improving the customer experience means growing the right capabilities to make an impact.

Go back to the basics of customer journey mapping

Pinpointing the right opportunities requires going back to the basics: customer journey mapping. It's easy to get wrapped up in your specific team's projects, but you have to step back and see the big picture.

"Within our own siloed functions, we can optimize all we want," KT says. "But it's not until you see how the customer crosses from one function to another and what that handoff looks like and what their experience is that you really start to understand some areas that you can improve in."

It doesn't matter if you're a startup or a large enterprise — it's always important to break down the walls and collaborate. A disjointed internal experience will yield a disjointed customer experience.

95% of customers who give a company a "very good" CX rating are "very likely" to recommend the company. (FullStory, 2021)

Focus your roadmap on capabilities

Try not to be mesmerized by shiny new technology if it doesn't make sense for your business.

Instead of starting with a tool and seeing how it fits your business needs,start the other way around. Look at your processes, at what capabilities you want to gain or grow. Outline changes and improvements that you want to accomplish and gather all of your business requirements.

There's no need to retrofit tools. Tools should seamlessly add to your existing processes and customer experiences.

Create a system so you don't let ideas slip through the cracks

KT has a system in place that prevents them from letting ideas go to waste. Anytime an idea or proposal is made, they put them in their "backlog." Then they have dedicated time each week to go through their backlog — prioritizing, determining level of effort versus benefit, etc.

This helps ensure all ideas are considered and accounted for and makes it easier to determine "what's next?"

Prioritize the customer experience from day one

For smaller companies and startups, KT's advice is to prioritize customer experience from the beginning. If you set up your systems and processes in ways that you know can scale, it can support your organization now and in the future.

A spreadsheet may be an "OK" solution now, but what about when you reach your goals 5 years from now?

Doing the legwork to set things up for where you want to be means you don't have to be as reactive. You're giving your organization space to grow. Customer experience is a major point of differentiation. It's much cheaper to keep an existing customer than attain a new one. Invest now so you can keep both customers and employees happy.

Happy customers and happy employees = happy profits.

Watch our discussion with KT >

How to run a top-performing call center with high agent morale

You can have the right people on your team, but if your morale is lower than dirt, you're going to suffer.

Call center success depends on great customer experiences, great agent experiences, and overall high morale. Here's a look at what's required to achieve a top-performing call center that thrives on the interplay of agent satisfaction and customer delight.

Expert Contributor:

Andrew Thomas, Call Center Director at Union Bank

Andrew has over 20 years of Call Center and sales experience with an emphasis on client satisfaction and a results-driven outlook. He has successfully built departments from the ground up to be successful, efficient, positive places that employees love to work for.

In his experience at companies including Mr. Cooper and Homepoint Financial, he's drawn on his strong communication skills, leadership and management of agents and available resources to best benefit business as a whole, while increasing positive metrics in all areas.

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Focus on internal communication

Messages can get misinterpreted. If you tell five different managers the same thing, it could be interpreted five different ways. The result is inconsistency and wasted efforts that don't align to your organizational goals.

When you're communicating a message to your team, ensure the message is clear. Both anticipate and encourage questions. If someone on your team isn't sure they understand, they should feel safe to ask questions, and you should be prepared to answer them.

Andrew emphasizes the importance of communication skills — from top to bottom and bottom to top. When everyone is communicating well and there is a healthy back-and-forth dialogue, you can:

- Improve results
- Ensure cross-functional alignment
- Create better transparency
- Foster a more supportive work environment

Hire coachable team members

"If you need someone to fill a seat, that's all they'll be," Andrew says. "Either they'll quit or they won't perform to your standards."
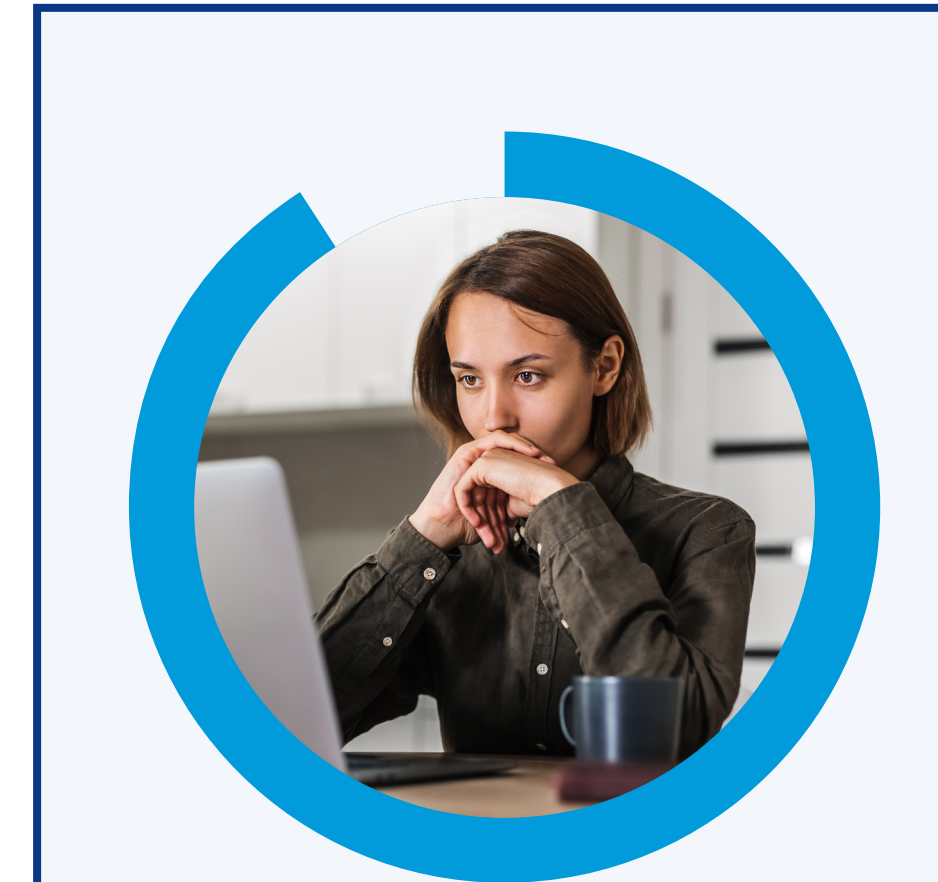
91% of employees said their leaders lack communication skills. (Interact/Harris poll)

You don't have to hire people who are already all-star call center experts. You just have to ensure they possess certain qualities that will position them for success. Are they empathetic? Are they a strong communicator? These are qualities you can seek out during your interviews.

Andrew likes to ask prospective team members about their hobbies, with specific follow-up questions. If the interviewee responds with short, nondescript sentences about something they're passionate about, then how could they succeed in talking about products/services to customers? Ensure they are able to paint a clear picture — you can coach certain skills, but this baseline level of communication should be there. Data doesn't only pinpoint the "bad." It can also reveal your strengths — things about your service that your customer likes and appreciates, and that you should continue offering.

Give credit where credit is due

"Credit is one of the most important currencies in the call center," Andrew says. If an idea comes from an employee, it shouldn't be perceived as coming from their boss, or their boss's boss, etc.

When agents don't get credit, they'll know. And then they'll stop providing valuable information and ideas. Growth will be stunted, morale will decline, and you won't see the results you want.

Giving credit could be as simple as verbal recognition in a one-on-one session or regular team meetings. Consider taking it a step further by recognizing employees monthly for their contributions and achievements. And when it comes time for annual reviews, have a log of each team member's achievements throughout the year. Providing this recognition can improve morale tremendously.

Prioritize authentic human connection between agents and clients

Despite advancements in technology, the essence of human connection remains irreplaceable. A call center isn't just a place to troubleshoot; it's an opportunity to build relationships. Customers crave an authentic interaction that acknowledges their unique circumstances and concerns. This is where the call center, as a hub of human interaction, takes center stage. It is the space where agents have the power to transform a routine customer service interaction into a memorable experience, one that resonates long after the conversation ends.

58% of US customers are ready to pay more to a brand if they can provide a better customer experience. (Forbes)

Remember, your agents are the heartbeat of your operation, and their satisfaction directly translates into customer satisfaction. Hire the right people, invest in their success, and empower them to be themselves, do their job, and do it well.

Empower your agents to establish genuine connections with clients. This requires:
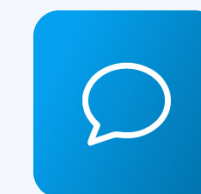
Allowing them to be authentic, without overly-scripted responses

Equipping them with the tools they need to meet your customers where they are

Emphasizing that it starts with the greeting, and make it important to start the conversation off with a helpful, friendly, and authentic tone

Watch Andrew's on-demand webinar for more >

About Glance

Glance makes it easy for enterprises to drive positive CX outcomes through personal, human-to-human connection right inside their website, customer portal or mobile app. With Glance Guided CX, leading brands empower their representatives to join customers at their exact moment of need and navigate together to the right solution, in an instant.

Hundreds of large financial services, health insurance, and SaaS enterprises trust Glance to help increase customer satisfaction, ensure brand loyalty, and create new revenue opportunities through Guided CX. With seamless API integrations, Glance fits into the most sophisticated CRM or CCaaS systems. Discover the power of Glance Guided CX at glance.cx.

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