



Maximize your ROI on Contact Center Surveying

By Dr. Jodie Monger

As the marketplace is moving from a service economy to an experience economy, contact centers are being vaulted from the position of being considered a back-office operation that has little strategic impact to the competitive differentiator that can be a weapon in a commoditize marketplace. With this shift and the realization that the contact center has access to more customer contacts and intelligence than any other part of the enterprise, measuring and enhancing the customer experience is in high demand and is highly visible within organizations. Throughout history, when we have seen demand dramatically rise, more organizations offer products and services to take advantage of the new market opportunity. Contact center surveying is now experiencing this effect.

As the inventors of real-time surveying in 1993, we have now collected over 5 million real-time post-call surveys. This experience has served to identify four main characteristics of survey programs that yield the greatest returns on the research investment. To assist with your program, we have summarized our experience.

The graphic is a blue-bordered box with a white background. At the top left is the Customer Relationship Metrics logo. The title "Four Keys to Maximum ROI for Contact Center Surveying" is centered at the top in white text on a dark blue background. Below the title is a 2x2 grid of colored boxes, each containing a key and a list of bullet points. At the bottom, the text "CATs®" and "www.Metrics.net" are displayed on a dark blue background.

Four Keys to Maximum ROI for Contact Center Surveying	
Quality Control before Reporting <ul style="list-style-type: none">•Survey scale errors corrected•Agent assignment errors corrected•Vulgar comments censored•Comments and scores validated•Needed to pass the "is this fair" test•Remove errors to remove legal liability•Realize Science and Law require QC	Real-time is recommended <ul style="list-style-type: none">•Allows for immediate alerts from dissatisfied callers•Allows for immediate alerts from First Contact Resolution breakdowns•Eliminates errors inherent in delayed surveys•Supported by Scientific Studies
To the Agent level <ul style="list-style-type: none">•Individuals as a group move center quality•Agent level maximizes ROI•Combine with call Monitoring for 360° view•Customers comments on individuals have more meaning	Robust Survey Instrument <ul style="list-style-type: none">•Collect scores and comments•Measure multiple concepts•First Contact Resolution battery•Immediate alerts from dissatisfied customers•Immediate alerts from FCR failures•Branching for detail

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First, it is important to note that anytime you ask customers to complete surveys, a portion will make mistakes. Some response errors are intentional and sometimes they are not. In either case, errors must be corrected to accurately use the results from your program to properly analyze the data and hold the right people accountable for the results. By collecting comments (explanations for scores) in your survey and by analyzing them with the score, errors can be corrected. We explain this in greater detail in our paper "When Customer and Agents make 'Noise' from Surveying and How to Fix It" which can be found on our website.

Second, linking customer feedback to a specific Agent will allow you to focus on specific performance issues for the individual. As each front-line person can speak to as many as 60,000 customers each year, our goal is to insure personal performance at the highest level. Much like your internal quality monitoring program focuses on the individual, so must your survey program. Quality assurance is an effort at the grass roots level – agent by agent, day by day, call by call.

Third, allowing customers to evaluate service immediately is the best methodology to utilize for several reasons. When customers are asked to recall events that occurred in the past, even the recent past, it is difficult for them to remember the specific agent attributes that created an exceptional, or not so exceptional, service experience. This issue with recalling past events causes scores to be inaccurate and therefore makes agent accountabilities from a delayed measurement an unfair assessment of individual performance. Metrics' article "*The Research Proves It...*" sites academic references supporting this issue and highlights the benefits of real-time surveying in contact centers.

Another critically important benefit of real-time surveying is the ability to be alerted when a customer has experienced a dissatisfying interaction. In today's marketplace and the wide spread access to the Internet, dissatisfied customers can communicate dissatisfaction with your company to tens of thousands in an instant. So being alerted in real-time allows you to prevent this from occurring and is likely to result in retaining the customer. Service failure is forgivable if addressed properly (and with a sense of immediacy). Real-time feedback also allows you to address and correct specific agent performance issues to avoid perpetuating poor service attributes and to identify and propagate best practices (as defined by the callers).

Lastly, survey construction requires knowledge, skill, and expertise. Asking too few or too many questions or poorly constructing the questions diminishes the value of the survey program and may even be harmful. In addition to collecting specific agent information, gathering brand and company image questions are important and can be used to prove your contact center vital contribution to your company's success. First contact resolution is another important concept and when included in your survey can assist in maximizing customer satisfaction as well as contributing to cost control. To properly measure your resolution metrics, more than one question is required. Separating problem versus non-problem calls is key to effectively gathering the intelligence you need. Metrics' article "*First Call Resolution-It's Measurement and Impact*" discusses this key metric in greater detail.

Your survey scale is also important. Many organizations use a 1-5 scale for their contact center survey, however we do not recommend or use this scale to measure contact center performance. Research in customer loyalty (Heskett, Jones, Loveman, Sasser, and Schlesinger) states that organizations must perform above an 85% level (customer delight) in order to create satisfaction at a level that equates to loyalty. When using a 1-5 scale, you may only count customers rating you a 5 (a 4 is under 85% performance) as your delighted customers. There is supporting research that states, no matter what survey scale you use some people will never give you a top box score. Using the 1-5 scale limits the variability in responses available to your customers and also limits the type of analysis that can be conducted.

Another benefit in using a larger scale like a 1-9, is that customers can easily take the survey with their telephone keypad. Most importantly, more robust analytics can be used to fully leverage your measurement program. Analytics will allow you to focus on the key drivers to maximize customer experiences. When provided with key driver analysis, focus can be directed toward the attributes that will drive delight. Without analytics, or the application of analytics incorrectly, the use of your survey data is limited, will prevent ROI maximization and may even cause harm. This is covered in greater

detail in our paper *“Reeling in Big ROI with Analytics...”*

By implementing these four key concepts into your measurement program, your research efforts will be fully leveraged. When others have failed to include all of these keys into their measurement program, the result has been lower performance gains by limiting their ability to implement positive change in their contact centers thereby never reaching the status of being a strategic weapon.

Dr. Jodie Monger, is the President of Customer Relationship Metrics (www.Metrics.net), and the inventor of real-time surveying in contact centers. Prior to creating Metrics she was the founding Associate Director of Purdue University's Center for Customer-Driven Quality. Her expertise is working with organizations to help capture and analyze the Voice of their Customer.



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