



Customer Service Training is Not Enough

Background

C Wenger Group is committed to help companies measure and improve customer service, satisfaction, and loyalty. We provide three different arrays of services to our clients:

- Customer Research (i.e. CSAT and Voice of the Customer surveys)
- Call monitoring and quality assessment (e.g. “Your call may be monitored....”)
- Training/Coaching (Customer Service Training, Agent Call Coaching, and etc.)

Each array of services may be provided independently. However, when they are employed together it forms a customer-centered cycle of continuous improvement.

When our late founder began the group over 25 years ago, he stipulated that we would only provide “data-led” training for our clients. In other words, any training we provided would be predicated on Customer Satisfaction (CSAT) survey data or Service Quality Assessment (SQA) data. He wanted to ensure that there was quantifiable data behind our training so that we can ensure clients that our training is focused on the right things; Skills we know will drive increased levels of customer satisfaction.

Our group is often asked to provide customer service training when we have not conducted a customer survey or quality assessment for the company or team making the request. At times we will provide basic customer service skill training based on our years of research and SQA that provide us with a basic, data-driven understanding of the common drivers of customer satisfaction.

Nevertheless, we continue to value Mr. Wenger’s deep wisdom and strong principles. We appreciate why he steadfastly refused to provide training without corresponding data to back it up. Most executives and managers desire to provide their Customer Service and Sales teams with training in basic service skills, and there are many training programs out there to choose from. The questions remain: *How do you know that the training is going to target areas of real need? Will team members apply what they learn? What kind of return do you really get on your training dollar investment?*

A recent client project conducted by our group provides compelling insight.

Case Study

In the fall of 2015, our group was contracted to implement a QA program for the Customer Service team of a regional telecom company. Our client has 11 Customer Service Representatives (CSRs) taking basic customer service calls regarding their bundled phone, Internet, and cable television services. We started our project with a pilot Service Quality Assessment that would provide benchmark data, for both the team and individual agents, from which future improvements could be measured.

Working in concert with our client's management team, we created a custom scorecard¹ consisting of 29 behavioral service elements in four general call categories. A weighted average of the four call categories was used to determine an Overall Service Index (OSI). Over a 30-day period starting in late September, our team randomly sampled and assessed ten recorded calls per agent. Our experienced call analysts listened for each of the 29 behavioral elements. Using a binary scoring methodology, analysts determined whether or not the agent demonstrated each of the specified service behaviors. If a particular behavioral element did not apply to a given phone call it was marked "not applicable" by the analyst. Only applicable behaviors factored into the results.

Along with the 29 behavioral service elements, our analysts also measured how long it took agents to access information from the system and how each call was ultimately resolved. A brief summary of each call was documented by the call analysts along with summary data regarding the types of callers and the stated reason for each call. Our analysts also documented 17 different policy or procedural issues, typically outside of the CSRs control, that may have negatively affected the customer experience and resulted in customer dissatisfaction.²

Our detailed pilot report, delivered just a few weeks after the sampling period, established the team's benchmark OSI at 84.6 (out of a possible 100). The report also provided a benchmark OSI for each of the 11 CSRs which ranged between 78.3 and 89. We then followed up our report with a custom produced customer service training session. The data-led training focused CSRs on three key service skills, identified by the Pilot SQA, which represented the greatest opportunity for the team to consistently improve the customer experience and their resulting Overall Service Index:

- Making sure you've answered all of the caller's questions or offering to help with future needs (missing on 92 percent of applicable opportunities).
- Apologizing for unmet caller expectations (missing on 88.5 percent of applicable opportunities).

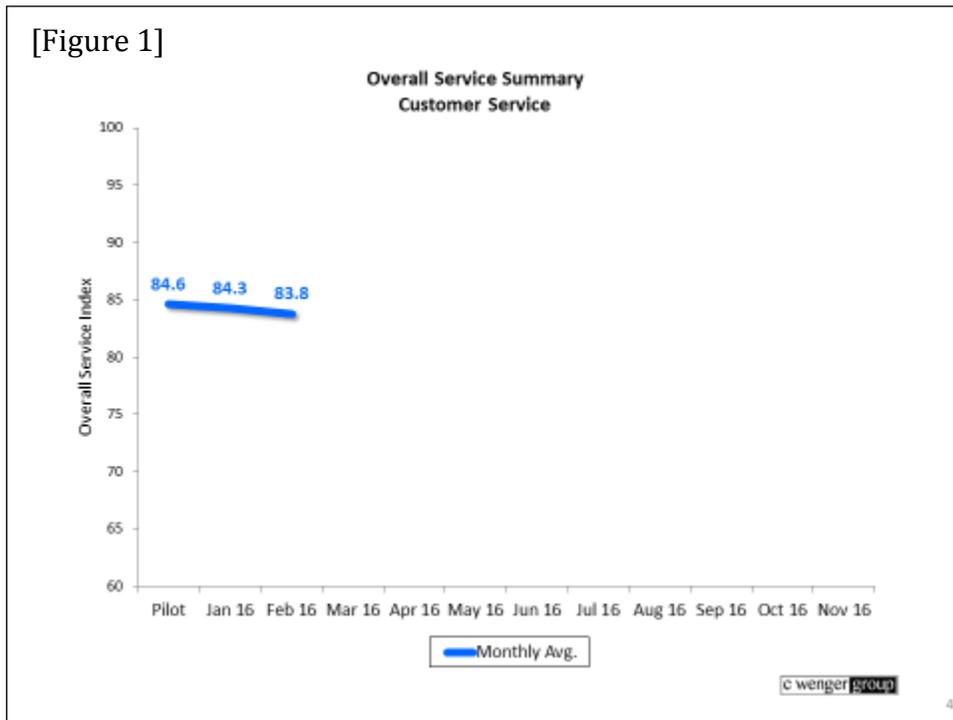
¹ Because the custom designed scorecard is proprietary to our client, it will not be provided in this white paper.

² Example of a procedural issue: When customers called with questions about newly installed services, CSRs routinely attempted to transfer the customer to the CSR who placed the order, even though they could answer the question themselves. It appeared to be a standard procedure that resulted in increased transfers and missed opportunities for one-call resolution.

- Establishing a courteous tone for the call by using a “please” or “thank you” within the first two requests made of the caller (missing on 90.8 percent of applicable opportunities).

It was intended that our pilot assessment would quickly be followed with an on-going quality assessment. The on-going assessment would provide data for team, and for each of the 11 CSRs, on a monthly basis. One month and three month rolling averages would be compared to the pilot assessment and document improvements in the consistent demonstration of measured service behaviors.

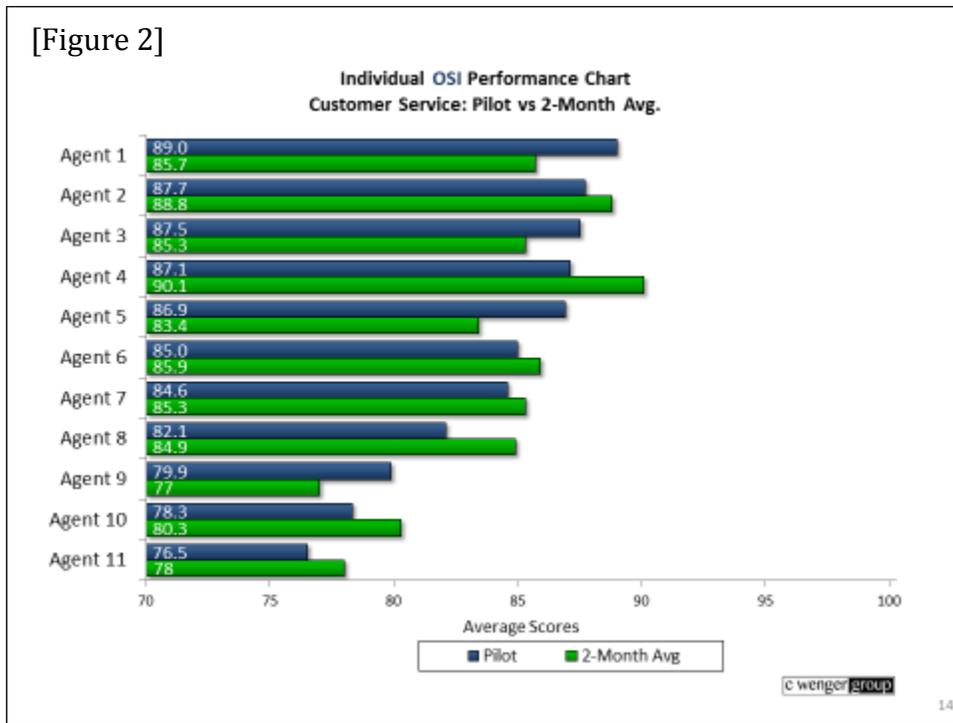
The implementation of our on-going assessment was delayed, however, because of the client’s system upgrade which included new call recording software. As a result, our team was unable to access and analyze calls until early March. By the time our team analyzed recorded calls from January and February and delivered the results, it had been over three months since delivering our initial data-led training.



Data in the first report of our on-going assessment covered both January and February calls. It revealed that the team’s OSI had actually made two insignificant declines from 84.6 in the pilot report to an average of 84.3 in January and 83.8 in February [Figure 1]. Of the 11 CSRs, only two CSRs demonstrated significant improvement (>2.5% increase) when comparing data from the pilot assessment to a combined average for January and February [Figure 2]. Four CSRs actually had lower OSI scores in January/February

compared to the pilot assessment. Five CSRs demonstrated insignificant improvement (<2.5% increase).

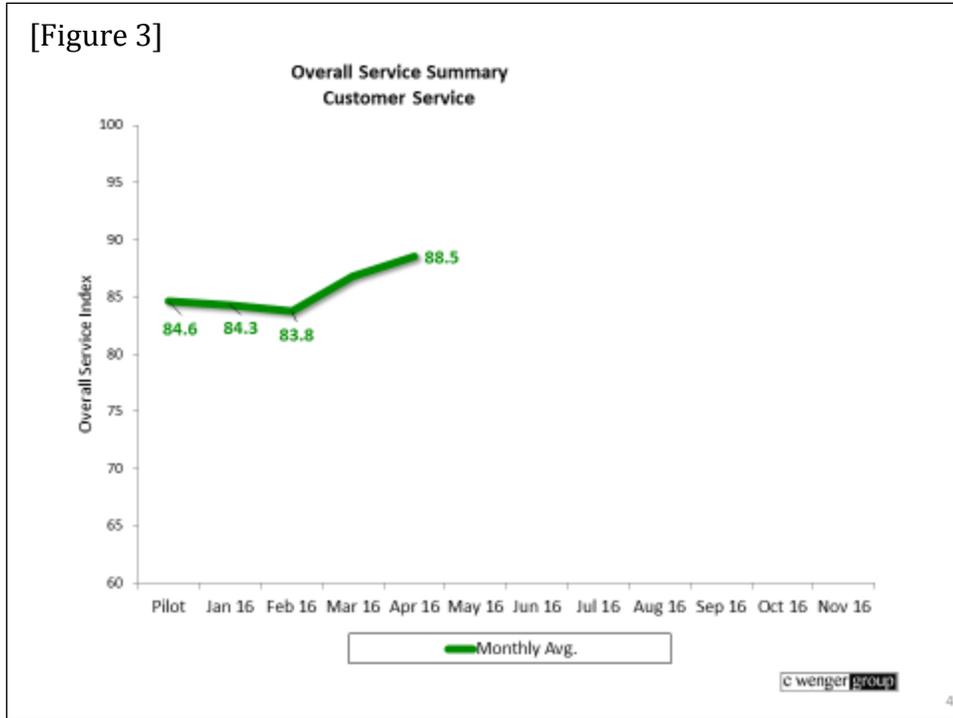
[Figure 2]



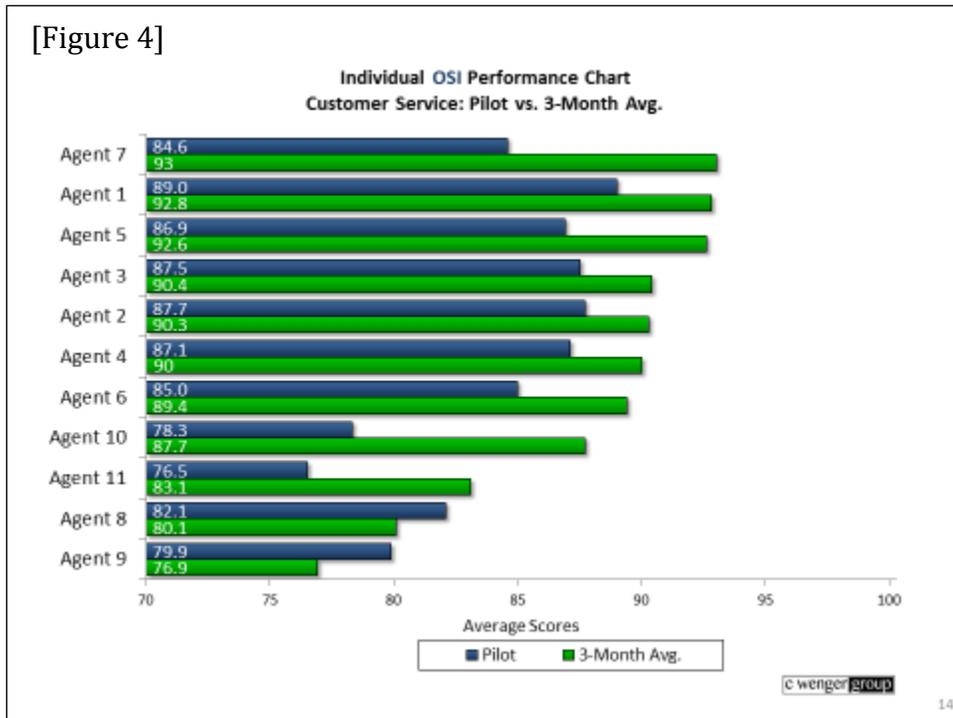
In other words, performance after our initial training was somewhat of a bell curve. Two performed better, four performed worse, and the rest stayed about the same.

In a stand-up presentation to the team, we communicated the results of the initial two months of team data showing that there had been no real improvement. Later that day each agent was able to view his/her own comparative OSI scores and see how they compared to the team. A few weeks later, we sat down with each of the agents and a supervisor to review his/her individual data. We also played three actual phone calls for each agent and coached them on how they could more consistently demonstrate the service skills we discussed in the team training.

[Figure 3]



[Figure 4]



The individual agent coaching coupled with monthly data delivered to each agent had a measurable and positive effect. The team’s OSI increased in both March and April [Figure3]. Our call analysts could hear the difference and spoke anecdotally with one

another about the improved service experience they were hearing in the recordings. With the encouragement and equipping of call coaching and the regular feedback of data, the agents began to apply the service skills we covered in their initial customer service training. By the end of May, three months after the individual agents began receiving regular updates, coaching, and accountability, nine of the 11 agents had made significant improvement over their benchmark scores and a majority had lifted their three-month OSI average above 90 [Figure 4].

Conclusions

When faced with the need to improve customer service, executives and managers are tempted to do what is easy and expedient. A one-time investment in a customer service training session appears to be an appropriate fix. It's relatively easy on the budget, it addresses the immediate need, and it appeases a manager's desire to prove that some action has been taken. It's another item to quickly check off the task list.

Our experience and the data from our recent assessment reveal that Mr. Wenger's wisdom had merit. Training alone will not effectively move the needle on your team's actual customer service performance. Training can provide critical information, but human nature rarely translates information into behavior change without the corresponding elements of regular measurement, feedback, coaching and accountability.

Next Steps

For over a quarter century, C Wenger Group has provided our clients with custom designed programs for measuring and improving customer service and customer satisfaction. We encourage you not to waste your resources on standalone customer service training that will have little or no tangible improvement in your customers' actual service experience.

Our group can design a turn-key system of measurement, assessment and training that will maximize your investment, provide measurable results, and help you profitably build your business. To discuss how our group could help your customer service delivery, please call Tom Vander Well who leads our group's *Service Quality Assessment* and training efforts.

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