

2002 SOCAP SYMPOSIUM

CALL MONITORING - TOOL OR TRAP?

Presented by:

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Our Focus for This Session...

**ASSESSING YOUR CALL MONITORING
“HOUSE”. SHOULD YOU...**

STAY PUT – IT’S PERFECT FOR US

REMODEL – IMPROVEMENTS ARE IN ORDER

REBUILD – THE FOUNDATION IS WEAK

STOP RENTING – WE NEED OUR OWN PLACE

MOMENT OF TRUTH

Any instance when a customer comes into contact with some aspect of your organization and has an opportunity to form an impression about the quality of service you provide.

Jan Carlson

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Take Home Quickie #1:

- **Quality call monitoring is a *process*, not a *program*!**

UP FRONT, LET'S FIND OUT...

- IS IT BEING DONE?
- IS IT BEING DONE CORRECTLY?
- HOW IS IT VIEWED AT ALL LEVELS?
- WHAT ARE WE DOING WITH THE INFORMATION?

***QUALITY
CALL MONITORING***

Positioning

Feedback

Tools

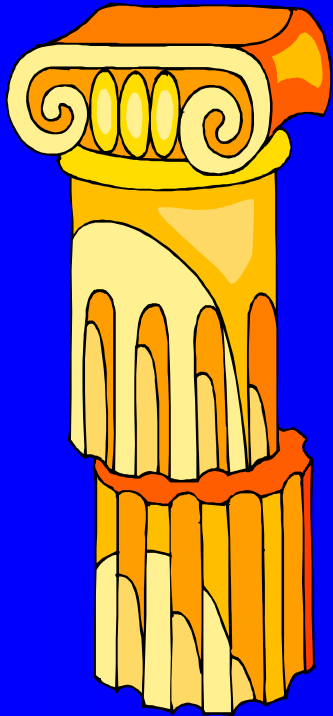
***Standards &
Expectations***

Support

Take Home Quickie #2

- When assessing your call monitoring house, each of the five pillars must be fully addressed. Which, if any, are keeping your process from becoming a tool?

Five Pillars Of Quality Call Monitoring



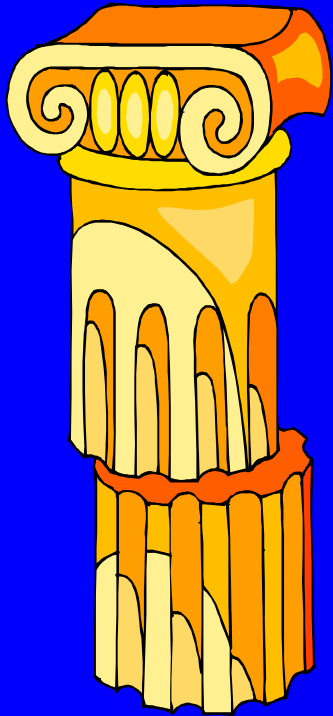
- ***POSITIONING***

- **COACHING ONLY**

- **EVALUATIVE ONLY**

- **COMBINATION OF BOTH**

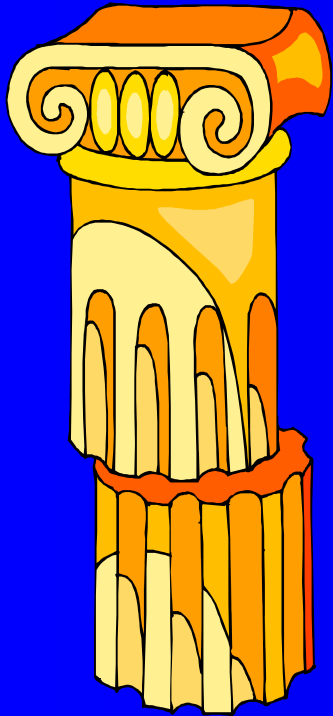
Five Pillars Of Quality Call Monitoring



- ***STANDARDS/EXPECTATIONS***

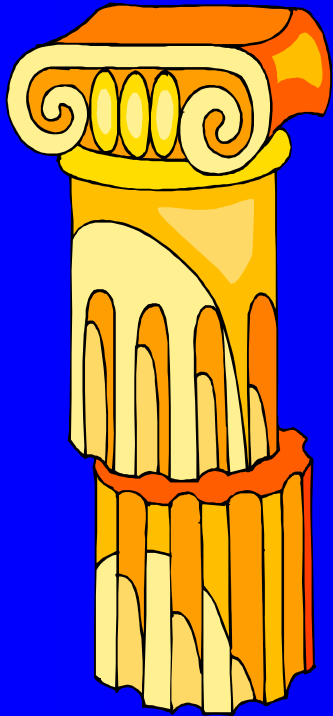
- HOW SHOULD THEY BE DETERMINED?
- UNIQUE TO OUR ORGANIZATION
- STANDARD: QUANTITATIVE
- EXPECTATION: QUALITATIVE
- SUBJECTIVE VS. OBJECTIVE

Five Pillars Of Quality Call Monitoring



- **CREATE OR ENHANCE TWO CRITICAL *TOOLS* – FORM AND DEFINITIONS DOCUMENT**
 - **8 KEY ELEMENTS TO FORM**
 - **4 KEY ELEMENTS TO DOCUMENT**

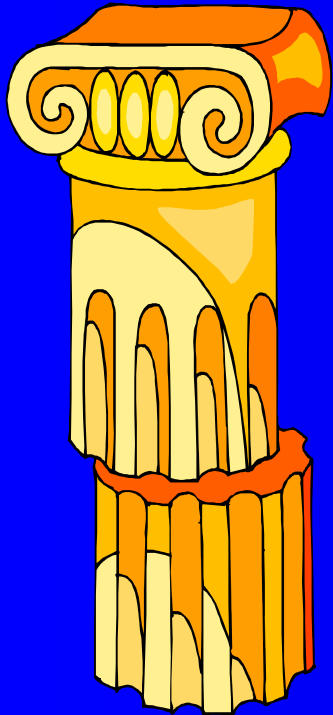
Five Pillars Of Quality Call Monitoring



- ***SUPPORT THE PROCESS***

- WHO MONITORS?
- HOW ARE THEY TRAINED?
- DEDICATED TIME?
- SPAN OF CONTROL?
- UNIFORMITY/CALIBRATION?

Five Pillars Of Quality Call Monitoring

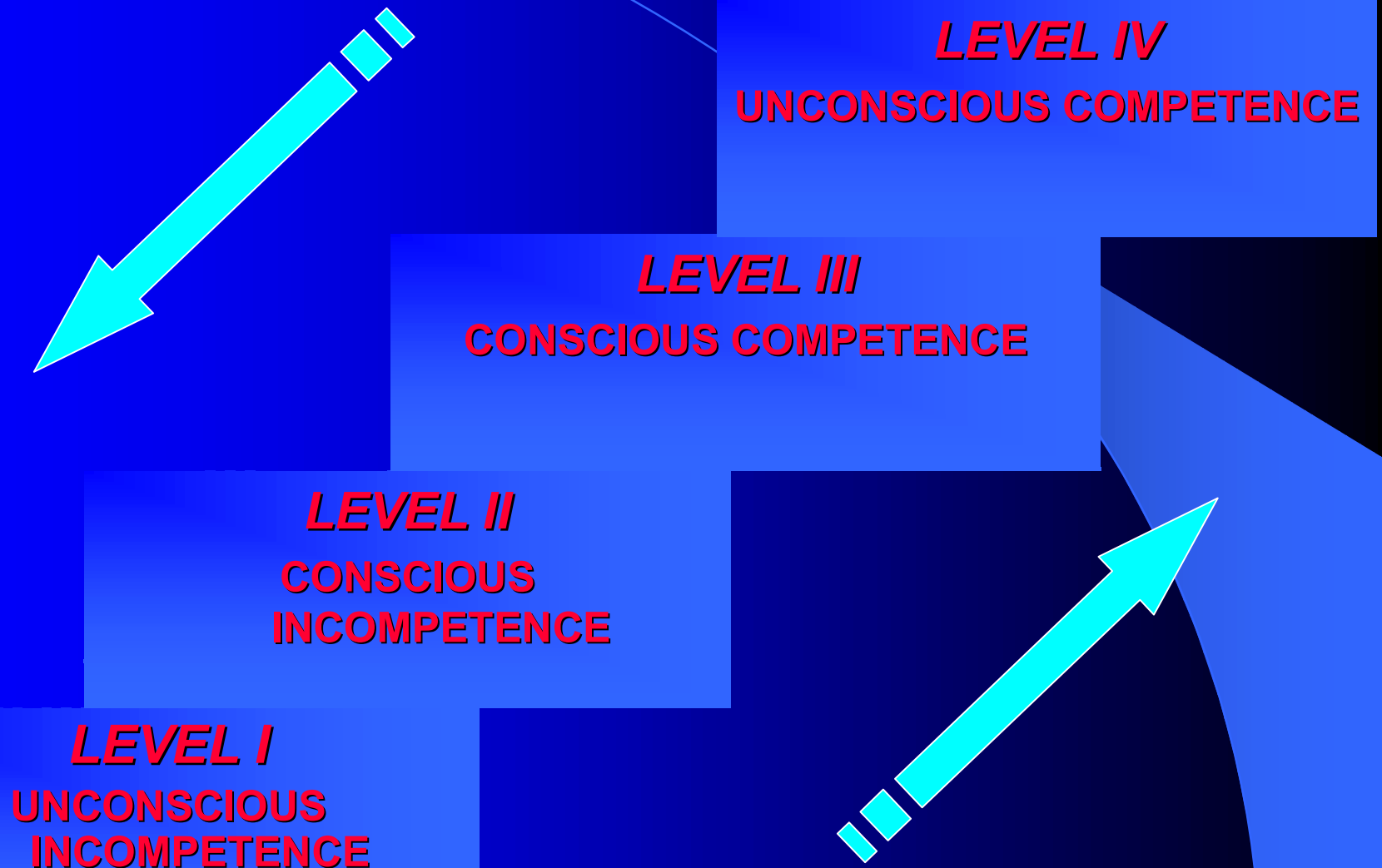


- **FEEDBACK!!! (COACHING FOR SHORT AND LONG-TERM IMPACT, USING FOR CONTINUOUS IMPROVEMENT)**
 - **FEEDBACK REGARDLESS OF OUTCOME**
 - **PRAISE, REDIRECTS, ONE-ON-ONES**
 - **RECOGNIZE AND REWARD**
 - **IDENTIFYING TRENDS/MAKING LINKAGES**

Take Home Quickie #3

- What an opportunity to.....“Catch Someone Doing Something Right!”

4 LEVELS OF LEARNING



Take Home Quickies #4-8:

- Ensure your standards/expectations are unique to *your* company & customers
- Assess your monitoring form
- Develop/enhance a Definitions Document
- Assign clear accountability and support the process
- Give feedback and use the results

WORKING TO MAKE GREAT CONNECTIONS BETWEEN CUSTOMERS, COMPANIES, AND EMPLOYEES!



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