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Skills, Mindset and Standards

*A Model for Sustainable Improvement
in Customer Service and Call Handling*

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1 Introduction

Ensuring high performance levels for every individual working in a customer service or call handling role is vital for the delivery of effective and consistent levels of service.

Organisations are continually looking for ways to develop and improve their people in order to achieve higher skills, higher productivity and more consistent performance.

Technology and systems play an important role in the customers' experience when dealing with an organisation. However, at the point at which the customer comes into personal contact – whether face-to-face or via the telephone, the quality of the interaction and the actions performed by Customer Service Agents (CSAs) shape the customers' impression and perception of the organisation and its service quality.

People, and the way they interact and serve their customers are therefore a vital component in the service 'mix'. The challenge for Customer Service and Call Centre Managers is therefore how to harness the energy, skills and abilities of their people to deliver the highest possible quality and consistency of service. This paper examines the complex issues that underlie and impact individual performance within this working environment.

In this paper we have used the terminology 'Customer Service Agent' (CSA) to refer to frontline service and call-handling professionals. This is not intended to be prescriptive and we recognise that there are numerous terms in use to describe this type of job role.

We also refer to Customer Service Agents in the text using the female form. This is for brevity and convenience only. We recognise and acknowledge that CSAs may, of course, be of either gender.

Acknowledgements

Thanks must go to numerous course attendees and certification candidates for providing feedback, input and ideas over many years. Each has contributed to our understanding of this complex subject and has provided valuable evidence for this paper. Short quotes are provided from course attendees in several places within the text. These quotations are not attributed in order to retain confidentiality.

2 Performance and Behaviour

The results and service outcomes achieved by a CSA depend on their actions and behaviours in the workplace. The exact behaviours will depend on the organisation and their specific job role. In a customer-facing environment, much time will be spent communicating with others and will include a combination of seeking and providing information, persuading and influencing, dealing with complaints and problem solving.

Analysing how each individual is performing in their role is complex due to the subjective nature of many of these skills and behaviours. However, analysis is desirable if each individual is to be stimulated to achieve peak performance.

A useful framework for analysing performance defines four key dimensions as follows:

Focus	Is there a focus on doing the right (i.e. important) things?
Quality	Are tasks undertaken to sufficient quality? i.e. accurately and with a minimum of errors and mistakes?
Productivity	Are tasks completed quickly and in sufficient quantity?
Consistency	Is behaviour and performance consistent over time?

In broad terms, these dimensions can be used to assess whether the individual is focussed on doing the right things. Is she working to a consistently high standard? Is she efficient and productive?

It is likely that each individual in the team will perform to different levels against each of these four dimensions. Within any team, there may be 'star' performers who consistently score highly on all dimensions. However, there are likely to be some whose performance does not always score so highly.

For example, some may work quickly but make errors and mistakes; others may lack focus on the important tasks; some may perform well on occasions but be inconsistent from day to day – finding it hard to focus effort or being affected by their personal life; some may let their performance be affected by an angry customer or a disagreement with a colleague.

To achieve peak performance, the manager or team leader will need to focus on ensuring that each individual within the team performs to their maximum potential, scoring highly on each of the four behavioural dimensions:

- Focuses on the key aspects of the job in hand
- Achieves high quality standards with few mistakes and errors
- Maintains high productivity and work output
- Performs consistently from day to day and week to week

Measuring performance requires investment in appropriate monitoring systems. Many customer facing departments now have systems that provide access to numerous measures related to call times, wait times, call abandon rates, call duration, wrap-up times and many others.

These measures are useful in providing information relating to overall efficiency and productivity. However, typically they are unable to provide information relating to call quality – the actual skills used at the point of customer interaction. As this is a key determinant of customer satisfaction, we consider that it should be an important inclusion in the metrics and measures within any customer service and call handling function.

2.1 Explaining Individual Performance – The Performance Model

Understanding exactly why some individuals behave in certain ways to deliver higher performance than others requires a clear framework for explaining performance and behaviour. This is important if the manager or team leader is to understand ‘what makes people tick’ and to take the correct actions to influence behaviour to achieve peak performance.

A useful model that can be used to explain performance focuses on three underlying ‘enablers’. Each of these enablers influences and determines behaviour - either stimulating or inhibiting the behaviours that determine effective performance.

Enabler	Description
Skills	The individual’s knowledge, understanding and the ability to apply it to perform necessary tasks.
Mindset	The individual’s core beliefs, thoughts and emotions.
Standards	The set of defined goals and standards that guide and limit individual behaviour.

For an individual to perform effectively, all three enablers need to work together to encourage and stimulate effective behaviours . i.e. the right skills, a positive mindset and a clear set of goals and standards. When the three enablers come together in this way, each individual will flourish and is likely to perform to her peak potential.

2.2 Understanding Performance Shortfalls

When individuals do not perform consistently to the levels expected in a customer facing environment, the impact can be felt in many different ways:

- Slow response rates and backlogs
- Inconsistent & indifferent customer handling
- Errors and mistakes
- Troubled working relationships
- Disappointed customers

Clearly, to maximise customer satisfaction and service quality, it is desirable for every individual to work to the peak of their abilities and potential.

Using the Performance Model as a framework, underlying causes for performance shortfalls and inconsistencies may fall into any of the three enabling factors.

2.2.1 Skills

Shortfalls in knowledge, understanding and skills will clearly limit the individual's performance and ability to perform effectively. This may apply to any area of knowledge or skills required by the job role including company knowledge, product or technical knowledge, communication skills, problem solving skills, dealing with difficult customers, influence and assertion skills.

Shortfalls in knowledge and skills typically arise in new and inexperienced staff who have had little training or experience in these areas.

2.2.2 Mindset

The importance of an individual's mindset in determining performance levels should not be underestimated.

Mindset covers both long term core beliefs as well as the daily thoughts and emotions that affect how we feel from day to day and hour to hour.

"Men are disturbed not by things but by the views which they take of them."
Epictetus. First Century Roman philosopher.

Albert Ellis, the renowned Psychologist has shown how an individual's mindset, the beliefs they hold and the way they interpret external circumstances will affect their emotions and determine their ability to perform to their potential.

Ellis has stressed that situations and events alone do not cause people to respond in a certain way. It is only when events are interpreted through an individual's belief system that behaviour and actions result. Our core beliefs therefore interact with events and experiences to determine thoughts, emotions and actions at any particular time.

Positive thoughts and emotions spur an individual to greater effort and to use their complete skills set. Whereas, negative thoughts and emotions such as worry, anger and frustration inhibit the person's ability to focus, apply effort and perform to their full potential.

Delivering customer service is an emotionally demanding role as there can be many situations that give rise to worries, concerns and anxieties. These may include concerns about change and job security, concerns over workload and frequently held anxieties regarding dealing with difficult customers or colleagues.

The pressures faced by CSAs commonly give rise to an 'erosion' of positive mindset – the gradual erosion of positive beliefs and thoughts regarding almost any aspect of the job role; e.g. the company, its products and services, the customers, the IT systems and the management. When this occurs, it will have a marked impact on the individual's feelings and their desire and ability to perform to their full potential.

Research also identifies the tendency for the human mind to adopt irrational and 'twisted' thinking patterns that are inappropriate and *don't* closely reflect the reality of situations and events. These irrational beliefs include:

Focus on shoulds and musts – the tendency to feel that things ‘should’ and ‘must’ be a certain way and that any deviation from this is unacceptable and unfair.

Awfulisation – the tendency to magnify things and believe that situations are far worse than they actually are.

Personalisation – the tendency to personalise and feel bad about things that are beyond an individual’s control.

Generalisation – the tendency to subscribe truth and general trends to unconnected events.

In a demanding customer service environment, irrational beliefs about customers, colleagues, managers and the organisation may take hold. Many of these unhelpful beliefs commonly cause distress and negative emotions that impact performance.

Examples of irrational and unhelpful beliefs:

“I hate dealing with angry customers”

“No one should speak to me like that”

“Nothing I do makes a difference”

“No one cares about me”

“We should be given more feedback”

“Its awful dealing with those people”

“I feel helpless in those situations”

“I should be able to do more for my customers”

“I must never make a mistake”

2.2.3 Standards

Lack of clarity in goals, or required standards of performance lead to uncertainty and inconsistency amongst teams and individuals. This arises as people simply do not know what is expected of them and how they are required to behave. As one CSA commented, *‘How can I do my job properly when no-one tells me what is expected?’*

When no clear behavioural standards are specified for dealing with customers, then behaviours are likely to be inconsistent amongst each team member and to vary over time.

3 Developing Peak Performance

Developing performance is a complex process. Not least because developing performance requires a change in behaviour – not just learning new ideas or concepts.

3.1 Developing Skills

Skills training, involving either public or in-company programmes to develop necessary skills is a commonly used strategy for improving performance. Many organisations invest a great deal in skills training. In the customer service field, typical programmes may include:

- Communication skills
- Problem solving skills
- Complaint handling
- Time Management
- Influencing skills
- Coaching skills
- Leadership skills

Training initiatives typically focus on developing practical skills. Courses often involve practical exercises and role-plays that allow delegates to practice new behaviours and skills.

In-company coaching by a manager or team-leader is also a popular method for developing skills – especially for new or inexperienced members. Very often, coaching involves a 'show and do' approach. Skills are demonstrated to the 'learner' who is then expected to replicate these skills in their job role.

"A great course. It reinforced a lot of things I already knew about customer service."

Skills training tends to focus at the behavioural level. Frequently courses do not deal with the individual's belief system and thinking patterns and so very often the issues surrounding thinking and mindset are not addressed.

This means that although a course may refresh or develop new skills, unless the person's thinking and mindset is developed accordingly, there may be no sustainable change in behaviour.

In cases where an individual's performance is inhibited by their mindset, a skills-based course will have little impact.

Case Study

Sam had been a CSA for four years. He felt ground down and de-motivated by having to constantly deal with angry and disappointed customers. These riled him and he lost his temper with customers on several occasions.

His manager suggested he attend a course on 'How to deal with difficult customers.' Sam attended the course which reinforced the key steps and skills in dealing with difficult customers. It reinforced the techniques he remembered from previous training.

On returning to work he focused on using the techniques taught on the course and managed this for several weeks. Over time he slipped back to his old ways and within six months there was no discernible difference. He still felt angry and frustrated and eventually asked to be moved to another department.

In this example, the CSA was unlikely to demonstrate a significant and sustained improvement through skills training alone. The CSA in question already had the required understanding and behavioural skills. He could not be helped by skills-based training or coaching, because the factors that caused disturbance and inhibited performance were rooted in the CSA's belief system and thinking patterns, not in a skills deficit.

For this CSA, improved performance would come about only by addressing the issue at a psychological and cognitive level i.e. changing the CSA's beliefs and thinking patterns. These techniques are addressed below in Section 3.2.

New ideas and good intentions

It is common for course delegates to return from skills courses full of new ideas and good intentions to change and do things better.

"This was a good course. I have learnt some great new ideas on dealing with customers."

However, change is difficult and requires effort. When there is no measurement or monitoring process to measure whether the new skills are being actively used in the workplace, then it is unlikely that the individual will be sufficiently motivated to sustain their efforts over the long term.

Without continual monitoring and reinforcement by their leaders, it is likely that the course attendees will quickly return to their old ways. Despite attending a high quality training course full of good ideas and tips, it is not uncommon for managers to report after six months that *'nothing has really changed'*.

3.2 Developing Mindset

Section 2.2.2 argued how a positive mindset is a key component that underlies high performance. Delivering a sustainable improvement may require a process to remove any negative and inhibiting beliefs and thoughts, reshaping and exchanging them for beliefs and thoughts that will stimulate performance and achievement.

Various psychological models and approaches exist to help change and develop beliefs and thinking patterns.

Developed in the 1960's The REBT model (Rational Emotive Behavioural Therapy) provides a framework and practical approach to helping individuals develop effective beliefs and thinking patterns. This approach is applicable to a business environment and may be readily applied in either one-to-one coaching or group interventions.

The approach is based on research that demonstrates how individual behaviour stems from thoughts and emotions. i.e. the way we think and feel, determines the way we behave.

The REBT Model developed by psychologist Albert Ellis states how an event (A) does not in itself cause an emotional or behavioural response. Rather it is an individual's belief system and resulting thoughts (B) about the event, that causes the emotional and behavioural response (C) to an event or set of circumstances.

By challenging and exchanging irrational beliefs (see Section 2.2.2) for more accurate and appropriate rational beliefs, an individual's emotions and behaviour can be altered and developed.

The REBT approach is well documented and clinically proven to bring about significant changes in feeling and behaviour, both quickly and with long term impact.

Using REBT techniques in either one-on-one or group interventions can help reframe irrational beliefs into more helpful beliefs. These techniques require a skilled and experienced practitioner to apply them.

"I now know that I don't have to feel bad just because bad things happen."

By using the ABC model described earlier, thoughts and beliefs can be reframed. These are powerful techniques that can have a profoundly positive impact on individuals. No longer subject to the often overwhelming impact of external events beyond their control, individuals are liberated to learn that, in fact, they can have control over their thoughts and emotions.

Removing inhibiting beliefs and exchanging them for positive beliefs in this way can have a profound and long term impact on behaviour and performance.

Case Study

Mary was an experienced CSA who frequently dealt with complaining customers. Often they were upset and angry. On occasions they could be rude and abusive. Mary would get upset about taking these types of calls. Her performance declined gradually and she decided that she wanted to leave the job as it was 'too stressful'.

Mary attended a workshop with an REBT trainer to help address the problem.

On probing, Mary made the following statements:

"Customers shouldn't talk to me like that. It's not fair"

"I shouldn't have to deal with people like that"

"I can't stand it when people have a go at me"

"When I get a call like that it ruins my whole day"

"I feel stupid and helpless when I can't do anything about it" (the customer's problem)

"It's really awful... I hate it."

After attending the REBT workshop, Mary was able to see that some of her previously held beliefs were based on irrational and 'twisted' thinking patterns. With help from the trainer/facilitator she was able to reshape her beliefs in the following terms:

"I can understand why sometimes they get abusive. I would really prefer it if they didn't, but I guess they have a right to be angry when things go wrong."

"I don't like it, but it's not the worst thing in the world."

"It's not my fault so I shouldn't take it so personally."

"I suppose it doesn't make them horrible people."

"I can only do what the organisation allows me, so it's not me that has failed. Why should I feel bad?"

"I can handle it. There's no reason really for it to affect my whole day."

Mary went back to work, armed with a new set of beliefs that removed the irrational thinking patterns and reshaped them into a set of more realistic and helpful beliefs. Her performance immediately improved. After six months, Mary remained happy and enthusiastic in her role. Angry and abusive customers were "no longer a problem".

3.3 Developing Standards

Clear standards that specify required behaviours and boundaries provide clarity and encourage consistent behaviours and performance.

3.3.1 Goals

Clear goals provide a vital starting point. Without clear goals to aim for, CSAs feel that they are 'working in the dark.' Goals allow each individual to know what they are trying to achieve and to focus their actions and behaviour accordingly. Moreover, only with clear goals can an individual know whether or not they have achieved the goal. The sense of achievement that comes about through meeting goals is a vital component of personal well-being and motivation.

Goals in a customer-facing environment commonly relate to numerical measures associated with productivity and efficiency:

- Number of calls taken
- Number of calls resolved
- Call abandon rate
- Speed of response
- Speed of resolution

Goals less frequently relate to subjective measures such as call quality and customer satisfaction, typically because these are more difficult and time-consuming to set and measure.

Ironically, the focus on productivity measures may not be helpful in actually developing and improving the quality of a customer's experience as this is often unrelated to the numerical measures listed above.

To be effective, goals clearly need to encompass a wide range of behaviours including the quality of interaction with customers.

3.3.2 Standards

Whereas goals inform the team and its members of *what* they should be aiming to achieve, a goal will not provide clear guidance on *how* it should be achieved or the standards of behaviour required to achieve it. Developing clear performance standards in addition to goals is therefore a vital component in encouraging a group to work in a consistent manner.

This means developing clear behavioural guidelines. In a call handling environment, this may mean developing clear guidelines on how to answer calls, how to address and speak with customers, procedures for placing calls on hold or redirecting callers, the questions to ask, procedures for verifying personal details, and the preferred responses to commonly received problems and requests.

Customer and call-handling standards should provide a starting point only. Extending behavioural standards to include all aspect of the job role and responsibilities can have considerable additional benefits. They may therefore include:

- Communication with colleagues
- Planning and organisation
- Tidiness and time planning
- Record keeping and updating
- Personal development
- Sales prospecting activities

To ensure that standards are acceptable to the team, it is good practice to involve the team in defining and setting them. A series of standards development workshops is a powerful method for tapping into the ideas of all team members and allowing each one to form and shape the standards they will be working with. This will ensure 'buy-in' and commitment and is vital if the standards are to be enthusiastically embraced and adopted.

3.3.3 Measures

Standards should be expressed clearly and precisely and in a form that allows objective as well as subjective measurement.

A scoring mechanism that allows individual performance and behaviour to be measured against the required standards is helpful. This allows clear measurement for each individual either by a manager/team leader or by an external agency.

A successful measuring and monitoring process can help to clearly identify strengths, weaknesses and performance development needs. When adopted as an ongoing process and repeated at appropriate intervals, this type of measuring and monitoring process is powerful in encouraging and establishing sustainable performance improvements.

4 Conclusion

The customer service and call handling environment is a complex and demanding environment for operational staff and managers. The challenges within this environment place a set of unique demands on staff of all levels.

To ensure effective behaviours and high performance, it is helpful for managers and team leaders to focus on three important 'enablers':

- Skills
- Mindset
- Standards

Each of these enablers interacts to influence and determine the performance of every team member. The relationships between the enablers in guiding individual performance can be complex to understand and unravel. To aid this, managers and team leaders need to develop their own understanding and skills in analysing and managing these factors to ensure high performance for every team member.

Whereas the techniques for developing skills are commonly well-understood and appreciated, developing mindset and clear standards are more complex tasks for any manager or team leader.

Proven techniques exist to help remove inhibiting beliefs and thoughts, and to help individuals develop and retain a positive mindset. These techniques should be embraced by managers and team leaders looking to develop and sustain high performance within their teams.

Setting effective goals, behavioural standards and continually monitoring individual performance requires clear focus and may be time-consuming. However, this should be a prime activity for any manager and team leader who wishes to encourage consistent behaviour and stimulate sustained improvement.