CALL MONITORING
What is Call Monitoring?

**Definition:** The act of listening to and recording phone conversations between customers and company employees in order to improve service, and as a record of what has been discussed and agreed.

**Call monitoring:** Helps a support team identify the strengths and areas of opportunity of our customer service representatives to ensure that we maintain an overall EXCELLENT customer experience. EVERY CALL, EVERY CONTACT, EVERY TIME!
CALL MONITORING METHODS
Silent monitoring: Real time monitoring performed by listening to customer interaction without the customer service representatives knowledge.

- Requires immediate feedback and follow-up coaching/counseling representatives.
- Measure quality assurance/quality control.
Side by side monitoring: Real time monitoring performed by sitting next to a representative.

- Great way to connect with your representatives
- Provides a floor presence
- Allows for immediate coaching and feedback
Test Call Monitoring: Performed by randomly calling into call center posing as a “customer” to observe and correct:

- Accuracy and consistency of information being provided to customers
- Tone levels
- Provides confirmation of learning
- Training opportunities
**CALL CALIBRATION SESSIONS**

**Calibration Session:** Conducted by reporting Supervisors and Quality Assurance/Quality Control Trainer to ensure CONSISTENCY between all individual monitoring's.

Calibration sessions should be conducted on a consistent basis to ensure that the trainer and reporting supervisor are disseminating the same coaching and feedback information.
PITFALLS
LACK OF CALL MONITORING

- Inconsistency with responses to customers
- Affects agents' performance
- Creates unnecessary callbacks
- Affects agent productivity
- Impacts the customer experience
- Impacts customer satisfaction survey scores
- No monitoring = no accountability
- Poor employee morale
MONITORING GUIDING PRINCIPLES

✓ SUPPORT
✓ COACH/TRAIN
✓ CALIBRATE
✓ FOLLOW-UP
✓ DOCUMENT/ACCOUNTABILITY
✓ CELEBRATE/REWARD
5 PROFESSIONAL CORE ROLES

- AMBASSADOR
- INFORMATION PROVIDER
- COMMUNICATOR LISTENER
- PROBLEM SOLVER
- PRODUCT/SERVICE CONSULTANT
MOMENTS OF TRUTH

• MOMENT OF MISERY = 79% or less
• MOMENT OF MEDIOCRITY = 80% - 89%
• MOMENT OF EXCELLENCE = 90% - 100%
CALL MONITORING FORM
### CUSTOMER SERVICE OBSERVATION OF INTERACTION FORM

<table>
<thead>
<tr>
<th>Customer Name:</th>
<th>Address:</th>
</tr>
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<tbody>
<tr>
<td>Date of Call:</td>
<td>Time: CSR:</td>
</tr>
<tr>
<td>Type of Call:</td>
<td>Date of Monitoring:</td>
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#### INTRODUCTION SECTION 30%

<table>
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</table>

- Identified Self and Company
  - (Utility Customer Service this is (state your name))
- Offered Assistance
  - (How may I help you today?)
- Attitude/Tone of Voice, Pleasant, Proper Volume
  - (SMILE G – How you sound goes a long way)
- Acknowledge Request
  - (Sure, I’ll be happy to assist you with that)
- Verified Caller
  - (May I ask whom I am speaking with?)
- Personalize/Use of Customer’s Name
  - (Mr. / Ms. Customer)

#### MAIN SECTION 50%

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</table>

- Obtained Personal Information
  - (May I have the address or account number?)
  - (Did you verify personal information such as last four of SSN, phone numbers, and verify or obtain email address?)
- Build Rapport
  - (Build a relationship of mutual trust or emotional connection)
- Active Listening Skills/Addressed Customer/Caller Concerns
  - (Acknowledge Customer’s concerns, Show Empathy, Respond)
  - (With out interrupting, ask General Questions to get a response)
  - (Provide complete accurate information if you were unable to address concern... did you call CAM or send a Callback etc.)
- Noted Account (Add detailed contact notes)
- Informed of Additional Products
  - (es-online, PayTally, Smart Bill, Budget Billing, Auto Check Withdrawal, Time of Use/ (Night & Weekend), Speed Pay, Energy Audits, Social Service Agencies, Pre-Pay Utility etc.)

#### SUMMARY SECTION 20%

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- Summarized Information/Agreement
  - (Review what you’ve done for them, ask is there is anything else you can assist them with TODAY?)
- Restate your Name
Offered Future Assistance
(Advice customers we are open from 7am – 11 pm
7 days a week they can also visit www.tilegov.com for more information)

Thank the customer for calling

Call Handle Time/Followed Proper Hold Procedures
Use K.I.G.H.I. (Keep it clean, hold it right, give it control, help customer understand what you are doing & Thank them for their patience)

99% - 100% = 5 Excellent
89% - 85% = 4 Good
84% - 80% = 3 Average
79% - 75% = 2 Poor
74% - or Less = 1 Unsatisfactory

Coaching/Feedback:
Continue: ________________________________
______________________________
________
______________________________
Stop: ________________________________
______________________________
________
______________________________
Start: ________________________________
______________________________
________
______________________________

Moment of Mediocrity
80% - 89%

Professional Core Roles

<table>
<thead>
<tr>
<th>Ambassador</th>
<th>Information Provider</th>
<th>Communicator/Listener</th>
<th>Problem Solver</th>
<th>Product Consultant</th>
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<tbody>
<tr>
<td>Energetic</td>
<td>Effective Communication</td>
<td>Acknowledgment</td>
<td>Analyze Issues</td>
<td>Promote Products</td>
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<tr>
<td>Diligent</td>
<td>Convey Clearly</td>
<td>Build Rapport</td>
<td>Resolve Problems</td>
<td>Recommend Services</td>
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<td>Consistency</td>
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<td>Accept Ownership</td>
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<td>Minimize Future Contacts</td>
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QUALITY FIRST
EVERY CALL.............
EVERY CONTACT....
EVERY TIME!!!!!!!!!!!

IT STARTS WITH YOU!
TRAINING & DEVELOPMENT RESOURCES

• SERVICE SIMS
• ROLE PLAYING
• CONSISTENT COACHING/FEEDBACK SESSIONS
GOING FROM GOOD..... TO GREAT!

✓ CONSISTENCY IN PROVIDING COACHING, FEEDBACK AND TRAINING ARE VITAL
✓ CONDUCT CONSISTENT CALIBRATION MONITORING SESSIONS
✓ REVIEW BUSINESS PRACTICES
✓ CONSISTENT DOCUMENTATION OF POOR PERFORMANCE
✓ REWARD GREAT PRACTICES & BEHAVIORS THAT CREATE EXCELLENT CUSTOMER EXPERIENCES AND FAVORABLE BUSINESS RESULTS.
✓ WHY SETTLE FOR GOOD..WHEN CALL MONITORING CAN BE GREAT