



Editorial Perspective:  
*6 Vital Management Lessons Your Contact Center Can Teach*



## 6 Vital Management Lessons Your Contact Center Can Teach

by Frank A. Kovach

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Great credit union contact centers aren't born, they're made—by great managers and the teams they create to provide outstanding member service. That's why one of the most pivotal management positions at many credit unions is that of the contact center manager.

On a daily basis, contact center managers balance a mastery of the technical information and performance metrics necessary to deliver consistently outstanding service with a keen appreciation for the upside potential that onboarding and cross-selling represent. This is no easy task, and watching an effective contact center manager integrate the two missions can inspire an entire credit union to provide better service at every level.

### Your contact center sets the tone for great service

**In my long career as Director of the Contact Center and Operations consulting team for Advisors Plus, far and away the very best people managers I have worked with have been the contact center managers.** Because meeting the challenge of melding a large and diverse group of employees into a cohesive team that goes "all in" to deliver great service takes such exceptional talent and skill, I believe that all credit unions can learn from the proven management techniques practiced in a successful contact center.

I always get a certain vibe from the managers and agents—even the space itself— when I first arrive to visit a new client, and there is a palatable energy at the best contact centers when everyone in the department is working together and is truly "in the zone" of serving members at a high level. For me, it doesn't get any better than seeing a well-run, coordinated contact center like that in action, but I have come to recognize that such an environment doesn't happen by chance or because of a manager's charismatic personality, technical know-how or seniority.

### The 6 habits of highly effective contact center managers

The managers who successfully create and nurture outstanding contact centers come in all shapes and sizes—male, female, young and old—with all kinds of backgrounds, but they share certain

characteristics in common in the techniques they use to manage their staffs. I consider them great contact center managers when they:

**1. Communicate their expectations clearly:** In every instance, the most successful managers set extremely clear and unswerving expectations for all of their agents. From minute one there is no ambiguity about what the job responsibilities are, what conduct is acceptable and what an agent must do to succeed.

For most credit unions, the contact center is an entry or near-entry-level position, with most agent positions tending to be starter jobs for new employees hired into the credit union. Since these new agents seldom have any extensive work experience, it makes setting expectations even more critical. For those unfamiliar with a professional work environment, managers need to ensure that boundaries are set as soon as new employees walk through the door.

**2. Always avoid playing favorites:** This is especially important in the contact center because its sheer size usually makes it the largest single department within a given credit union. With that size come dynamics that are not normally present to the same extent elsewhere within a CU organization such as a full range of personalities, all possessing different attitudes, opinions and work habits.

Add in today's propensity for people to share *everything* and potential conflicts can quickly add up for a manager. Giving a pass to one employee on a behavior issue can quickly escalate as the employee tells everyone about the lenient treatment. In an average credit union contact center of 15-20 agents the manager has suddenly created a false impression to the entire staff. And remember, the larger the group, the tougher it is to regain credibility.

**3. Never undermine other managers:** To effectively set and enforce expectations, it is vitally important that every level of both contact center and credit union management be on the same page. If a contact center has supervisors, trainers or even lead agents along with the manager, all of these employees need to speak with one voice. Nothing undermines management's credibility more than giving agents—or any other CU employees for that matter—the ability to play "mom vs. dad" as they probe for a more agreeable outcome. Consider doing joint reviews and one-on-ones if there are multiple managers to subtly and consistently deliver the message of a unified front.

**4. Take time to explain the "whys" behind the "whats":** In the credit union contact centers where I've seen managers struggle or performance take a dip, the problems invariably trace back to clashing expectations rooted in basic or minor misunderstandings. In fact, probably the most common complaint we come across from agents runs along the lines of, "Why do I always have to be in my seat when the staff in X department gets to come in whenever they want?"

Managers certainly understand why schedule adherence and availability make or break service levels. But all the new agents see are other employees receiving different treatment. All of this can—and should—be avoided when the manager clearly sets out the job expectations on the first day. And when explaining those expectations, it is absolutely critical that the manager take the time to explain the WHY behind them.

**5. Believe in "the Power of One":** As a manager you want your people first and foremost to succeed and if you have selected properly, those whom you hired will want to succeed. Every good employee wants to know what it takes to perform well and will welcome a clear outline of what is expected. By providing that guidance from Day 1, you will help set the course for each of your new agents to become a valuable team member.

One of the very best learning tools we've seen on this subject is a book, published by The Call Center School, called *The Power of One*. Author Penny Reynolds highlights the importance of each and every agent being available and provides other helpful tips for contact center success. I highly recommend that every credit union contact center invest in having copies available for their agents.

**6. Build cohesive teams around shared goals:** Contact centers may have their own cultures but nothing good can possibly come from making contact center employees feel isolated from the rest of a credit union organization. As a manager, you can take the lead in fostering the joint expectation that you will do everything in your power to establish consistent and accurate two-way communication channels between the contact center and the other areas of your credit union.

This can be especially challenging because it's usually a fact of contact center life that split meetings will be required due to the need to cover calls and possibly even multiple shifts. Launching a successful initiative to enlist everyone's help on all shifts and at all levels of the management team to make sure that key objectives are set beforehand, messages between the various meetings are coordinated, and information from one meeting gets passed on to all employees can be highly empowering to the overall team environment.

### Feedback fuels teamwork

Overall, whether the successful credit union managers I've described here came up through the contact center ranks or not, they never lose sight of the fact that the employees who work for them crave the information and feedback necessary to do their jobs—serving your members—as well as possible. They respect their staff's inherent desire to do well by reinforcing positive action and establishing that "vibe" that tells me instantly that I'm in a well-run, successful contact center and credit union as a whole that is enjoying the daily challenge and teamwork of providing great member service.

## For More Information

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## About Advisors Plus Consulting Services Contact Center Consulting

Advisors **Plus** Consulting Services Contact Center Consulting uses best practices methodology and a proprietary database of benchmarks to help your credit union's contact center operate more efficiently and profitably. Our team helps credit unions with:

- Contact Center Start Up
- ACD Routing & Scripting
- Key Metric Benchmarking
- Contact Center Optimization
- Staffing Analysis w/ERLANG C
- Organizational Structure
- Mystery Shopping
- Outsourcing Analysis
- Incentive Plans

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Advisors **Plus** was established in 2004 to provide consulting and marketing services to credit unions. Our range of services covers the key areas of strategy, credit cards, debit and checking, marketing, contact center, operations, and branch sales.

The experienced consultants at Advisors **Plus** work with a credit union's staff through the entire process from project analysis to implementation and management. Our goal is to ensure that each credit union client achieves sustainable business growth, exceptional member experiences and operational efficiencies.

As of December 31, 2014, Advisors **Plus** has superior NPS Scores of: 74 – Credit; 81 – Debit and Checking; 91 – Contact Center. For more information, please visit [AdvisorsPlus.com](http://AdvisorsPlus.com).