



SQM

OFFICIAL AWARDS GUIDE '10



contact<sup>+</sup>

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**World Class Care...  
Every Customer...Every Time.**

We are delighted to announce that Scotiabank's Customer Contact Centres have been awarded top honors by the Service Quality Measurement (SQM) Group.

Our 2010 North American Call Center Service Quality Awards of Excellence include:

- ♦ Call Center of the Year
- ♦ Call Center World Class Call Certification
- ♦ Highest Customer Satisfaction for the Banking Industry
- ♦ Highest Employee Satisfaction for the Call Center and Banking Industries
- ♦ First Call Resolution Improvement
- ♦ World Class Employee Satisfaction

SQM benchmarks over 450 leading international call centers and conducts over 1 million customer surveys annually. SQM awards excellence in service quality for the call center industry and considered to be the most prestigious call center awards in the industry.

# Letter from SQM's President & Founder

SQM's 12th Annual Most Prestigious North American Call Center  
Industry 2010 Awards for Service Quality Excellence Program

**November 18, 2010**

Dear SQM Guest,

Thank you for choosing to attend SQM's 12th Annual Most Prestigious North American Call Center Industry 2010 Awards for Service Quality Excellence.

At this year's awards dinner, we will recognize 25 organizations with 37 different awards including Call Center of the Year, World Class Certification, First Call Resolution (FCR) Improvement, Highest Employee Satisfaction (Esat) and Highest Customer Satisfaction (Csat).

This year, we will recognize the Top 11 World Class CSRs Finalists who are the "best of the best" Certified World Class CSRs, and of those 11 CSRs, we will announce the 2010 CSR of the Year. The CSR of the Year will be given \$1,000 in cash at the awards dinner. SQM will also recognize the Top 10 World Class Call CSR Improvement Winners for 2010.

Also, we will be recognizing 6 World Class Supervisors who are the "best of the best" Certified World Class Supervisors, and of those 6 Supervisors, we will announce the 2010 Supervisor of the Year. The Supervisor of the Year will also be given \$1,000 in cash at the awards dinner. We believe that Supervisors are a key ingredient to creating World Class FCR, Esat and Csat call center performance. SQM will also recognize the Top 2 World Class Call Supervisor Improvement Winners for 2010.

In the last 5 years, SQM has experienced a revenue growth of over 400% and a sky-high client retention rate of 95%. This year, however, has been especially exciting for us at SQM with recently being recognized by *Profit 100* magazine as one of the fastest growing companies in Canada. *Profit 100* magazine published a case study on how SQM was able to achieve over 400% revenue growth and a 95% client retention rate.

SQM has been benchmarking, tracking and helping leading North American call centers to improve their performance

for over 14 years. In fact, over 70% of our tracking clients improve their FCR and operating costs year over year. For those clients that have improved, they have experienced, on average, a 5% FCR improvement. For the average call center SQM benchmarks, a 1% improvement in their FCR performance equals \$276,000 in annual operational savings. As a result of benchmarking in excess of 450 call centers and surveying more than one million customers and 25,000 CSRs on an annual basis, SQM has gained valuable insights into call center FCR, Esat and Csat performance. These valuable insights have resulted in the best practices presented in the book, *World Class Call Center*, that we published last year, and has been validated by world class call center leaders. Again, we look forward to sharing world class call center research and best practices at this year's award conference.

In closing, I would like to congratulate all the award winning organizations and their CSRs and Supervisors who received World Class Certification. Your world class performance is vital to your organization's success!

Thank you!

Sincerely,



**President & Founder | SQM Group**

# AWARDS

SQM OFFICIAL AWARDS GUIDE 2010

## CALL CENTER OF THE YEAR

### ORGANIZATION

Scotiabank (Nova Scotia)

*Criteria used for Call Center of the Year are based on having the highest combined customer and employee overall very satisfied (top box response) rating.*

## CALL CENTER WORLD CLASS CALL CERTIFICATION

### ORGANIZATION

Blue Cross & Blue Shield of Kansas  
 Canadian Tire Financial Services (RA)  
 Citi Client Services - Dealer Support (Ontario)  
 Citi Retail Services - Credit Operation (AZ)  
 Davis + Henderson (Ontario & Quebec)  
 Insurance Corporation of BC (Claims Division)  
 Jackson National Life Insurance Co. (Michigan)

Marriott Systems Support Center (Maryland)  
 Rogers Business Support Group (Central)  
 Scotiabank (Alberta & Nova Scotia)  
 Scotia International (Dominican Republic)  
 Sun Life Financial Group Retirement Services (Ontario)  
 VSP Vision Care (California & Ohio)

*Criteria used for Call Center World Class Call Certification are 75 percent or higher of the calls are at the world class level for six months or more in 2010. SQM's world class call criteria are based on the customer's call being resolved, the customer is overall very satisfied (top box response) rating with their call center experience and the customer service representative.*

## CUSTOMER SATISFACTION /FCR AWARDS

### ORGANIZATION

### AWARD

#### HIGHEST CUSTOMER SATISFACTION FOR THE CALL CENTER INDUSTRY AWARDS

U.S. Bank  
 TD Canada Trust  
 Grand & Toy

1. Best Selling Customer Satisfaction  
 2. Highest IVR Customer Satisfaction for Self Serve  
 3. Highest IVR Navigation to the Right CSR

*1. This award recognizes the call center with the highest customer satisfaction (top box response) rating for selling approach.  
 2. This award recognizes the call center with the highest overall customer satisfaction (top box response) rating for a self serve IVR.  
 3. This award recognizes the call center with the highest IVR navigation to the right CSR the first time.*

#### HIGHEST CUSTOMER SATISFACTION BY INDUSTRY AWARDS

Scotiabank  
 Jackson National Life Insurance  
 Discover Financial Services (LLP)  
 VSP Vision Care  
 Blue Cross & Blue Shield of Kansas  
 OfficeMax / Grand & Toy (tie)  
 Arizona Public Service  
 Cogeco  
 Insurance Corporation of BC (Claims Division)  
 Marriott Systems Support Center  
 Region of Halton  
 VSP Vision Care

Banking  
 Financial  
 Credit Card  
 Insurance  
 Health Care  
 Retail/Service  
 Energy  
 Telecommunications/TV  
 Union  
 Helpdesk  
 Government  
 Business to Business

*Criteria used for highest customer satisfaction for each specific industry/sector are based on having the highest world class call rating for an organization.*

#### FCR IMPROVEMENT AWARDS

Blue Cross & Blue Shield of Michigan  
 Blue Cross & Blue Shield of Minnesota  
 Cogeco (Quebec)  
 Enmax  
 Scotiabank (Alberta)  
 Terasen Gas

*Criteria are based on a five percent or greater annual FCR improvement from the most recent study within the last two years.*

# AWARDS

SQM OFFICIAL AWARDS GUIDE 2010

## EMPLOYEE SATISFACTION AWARDS

### AWARD

### ORGANIZATION

Scotiabank (Nova Scotia)

*Criteria used for highest employee satisfaction for the call center industry are based on having the highest employee overall very satisfied (top box response) rating with working in their call center.*

Banking  
Insurance  
Energy

Scotiabank  
VSP Vision Care  
Arizona Public Service

*Criteria used for highest employee satisfaction for each specific industry are based on having the highest employee overall very satisfied (top box response) rating with working in their call center.*

Arizona Public Service

*Criteria is based on highest Esat improvement from previous year.*

Arizona Public Service  
Scotiabank (Nova Scotia)  
Quantum  
VSP Vision Care (California)

*Criteria are based on 50 percent or higher of employees who rate their overall experience of working in the call center as very satisfied (top box response) rating.*

**HIGHEST EMPLOYEE SATISFACTION FOR THE CALL CENTER INDUSTRY AWARD**

**HIGHEST EMPLOYEE SATISFACTION BY INDUSTRY AWARDS**

**MOST IMPROVED EMPLOYEE SATISFACTION**

**WORLD CLASS EMPLOYEE SATISFACTION AWARDS**

## CSR FINALISTS FOR CSR OF THE YEAR

### EMPLOYEE

### ORGANIZATION

**Catherine Ngo Ngom**  
**Dalmar Godad**  
**Amanda Fitz**  
**Sabeen Sheikh**  
**Ivan Jehangir**  
**Shant Demirjian**  
**Nazreen Abdulla**  
**Christopher Ketel**  
**Wendy Mackay**  
**Tyler Brown**  
**Sherri Murphy**

Davis + Henderson  
Scotiabank  
Blue Cross Blue Shield of Michigan  
Scotiabank  
Insurance Corporation of BC (Claims Division)  
Scotiabank  
LoyaltyOne – The Airmiles Group  
Rogers National Customer Care  
Scotiabank  
Sun Life Financial  
VSP Vision Care

*To be eligible the customer representative must be a World Class Certified customer representative. The criteria for a Certified World customer representative is 75 percent or higher of the calls surveyed are at the world class call level. Call center management must send an example of a great customer service story that a CSR delivered.*

## SUPERVISOR FINALISTS FOR SUPERVISOR OF THE YEAR

### EMPLOYEE

### ORGANIZATION

**Patricia Burnett**  
**Jason Taylor**  
**Amy Kelly**  
**Vivianne Karaoghlanian**  
**Lisa Elliott**  
**Michelle Geisel**

Insurance Corporation of BC (DTVl)  
Rogers Business Customer Care  
VSP Vision Care  
Rogers Business Customer Care  
VSP Vision Care  
Sun Life Financial

*To be eligible the supervisor must be a World Class Certified supervisor. The criteria for a Certified World Class supervisor is 75 percent or higher of the calls surveyed are at the world class call level. Call center management must also send an example of a Csat CSR coaching story.*



## SQM ANNOUNCES OUR 12TH ANNUAL MOST PRESTIGIOUS NORTH AMERICAN CALL CENTER SERVICE QUALITY AWARD OF EXCELLENCE WINNERS FOR 2010

JUDGED BY CUSTOMERS WHO CALLED A CALL CENTER AND EMPLOYEES WHO WORK IN A CALL CENTER

SQM benchmarks over 450 leading international call centers on an annual basis and has been conducting first call resolution (FCR), employee satisfaction (Esat) benchmarking and customer satisfaction (Csat) benchmarking studies since 1996. On an annual basis, SQM conducts over 1 million surveys (over 450,000 live surveys and over 550,000 IVR surveys) with customers who have used a call center, email, website or IVR contact channel service. SQM also conducts over 25,000 surveys yearly with employees who work in call centers. Our customer and employee survey database is one of the largest in North America. SQM does business in 11 countries around the globe: Canada, United States, Argentina, Australia, Puerto Rico, India, Philippines, Costa Rica, Mexico, Dominican Republic and Jamaica. Based on the call center benchmarking studies, SQM awards excellence in customer and employee satisfaction for the call center industry. It has recognized top performing call centers for customer and employee satisfaction since 1998. SQM awards are based on customers who have used a call center and employees who work in a call center and are considered to be the fairest and most prestigious call center awards in the call center industry. SQM conducted the benchmarking studies for the period of October 1, 2009 to September 30, 2010.

For each call center that participated in the customer benchmarking study, SQM completed 400 post-call phone surveys, conducted by SQM's telephone survey representatives. A sample size of 400 surveys provides a margin of error +/- five percent with a confidence level of 95 percent. All customer post-call phone surveys have approximately 12 or more questions and take

approximately four to five minutes to complete. The surveys were conducted within two business days of the customers' calls to the call center in order to understand their satisfaction with their call center experience. SQM uses an in-depth post-call customer survey approach that consists of both rating questions and follow-up customer feedback questions that can be used to help the call centers improve their FCR and Csat performance.

In addition, for each call center that participated in the employee benchmarking study, SQM completed a minimum of 100 customer service representative (CSR) surveys or if the call center had less than 100 CSRs, 90 percent of the CSR workforce completed surveys. All employee surveys had 50 or more questions and were conducted online at the CSR and supervisor levels. This confidential employee online survey took approximately 30 minutes to complete. SQM uses an in-depth, online employee survey approach that consists of both rating questions and follow-up employee feedback questions. The employee survey focuses on the call center's FCR, Esat and Csat performance from a CSR and supervisor perspective and provides opportunities to improve the call center's FCR performance in terms of people, process and technology practices. SQM has 37 different awards that recognize the top performing call centers. These prestigious Call Center Awards are presented at our Annual Conference held in Toronto November 17th and 18th, 2010.

# GREAT CUSTOMER SERVICE STORIES

AWARD WINNING STORIES FROM THE FRONT LINES

## THWARTING SUICIDE WITH PATIENCE, PERSEVERANCE

*"My life has no meaning; I want to end my life."*

Working in a call center is an adventure. When you start your day, you never know what to expect. That's what makes it special and interesting. You never get bored because each call is unique.

One day, I received a call from this man in his 60's who called to place a cheque order. He had a hard time providing me with his banking information, so I was not able to access his file. He was confused and emotional. In order to respect his dignity, I kindly asked him to take his time and read all the numbers at the bottom of his cheques. Suddenly, he burst into tears and told me that he lost his wife in death a few months ago and he wanted to commit suicide. At first I didn't know what to say. I was in shock. I empathized with him, told him how difficult it must be to lose a loved one in death, but I reassured him that life goes on. I tried to comfort him the best I could, but he kept saying, "My life has no meaning, I want to end my life."

While I was talking to him, I tried to find the SOS Suicide number so that a professional would assist him. It took me 1 hour and 20 minutes to reason with him. Finally, he agreed to call for help. He placed his cheque order and I was able to end the call. Immediately when he hung up the phone, I called the SOS Suicide in order to make sure he gets help. The next day he called to thank me for saving his life and for my excellent service, kindness and patience. He appreciated my listening ear. He insisted to have my full name and address to send me a thank you gift. I thanked him for his generosity and also explained that the only thing that really mattered was that he was getting the help and support he needed and the gift was not necessary.

What I've come to learn from this experience is that in customer service we definitely need to be helpful and take the extra step to enhance the level of customer satisfaction. We also need to be patient, active listeners who show empathy while viewing each call as special and unique.

Catherine Ngo Ngom - Davis + Henderson

## GETTING FUNDS FAST TO STRANDED THEFT VICTIM

*"Empathy, emotional connection and creative problem solving can and do go a long way."*

"Thank you for calling Scotiabank, my na —," my usual greetings were stopped in mid-sentence by convulsive weeping and incoherent words that seemed so distant. After a few seconds, the phone connection cleared up and I could make out the words, "help me!" Following my reassurances, she calmed down long enough to explain that she was calling from Thailand to report the theft of her purse. She just arrived at a hotel on the outskirts of Bangkok for a month long backpacking trip. Utter despair was palpable in her voice when she added that she was now without her

bank card and without cash. As I probed empathetically for more information, the severe urgency of her situation became more evident. She didn't carry any other debit/credit cards nor travellers cheques. Her parents did apply for a supplementary credit card with another financial institution but that bank could not deliver the card on time for her trip. Hence her ScotiaCard was literally her lifeline; without it she would be spending her first night in Thailand on the streets. The hotel owner would not give her a room without payment upfront. Nevertheless, she was allowed to use the lobby's Wi-Fi to make a Skype call on her laptop to get the help that she desperately needed.

She had called earlier and was advised by the previous two representatives that "nothing could be done" except cancelling the card, which she declined. In fairness, my colleagues were simply following the standard operating procedures which dictated that a replacement card could be mailed by the Contact Center within five business days but to her Canadian address only. Her domicile branch could possibly courier a debit card to her in Thailand but it was a Saturday evening and the branch was closed until Monday. Out of sheer despair, the customer was calling us a third time. I owe it to the customer to be as persistent if not more in searching for a resolution. What if it was me on the other line? At first, I offered to call her family on her behalf but no answer. Her friends were also unreachable. Stranded and homeless, thousands of miles from home in a foreign country, her adventure in South East Asia was turning into a bad horror B-movie. The distortion of the Skype connection and the background Thai voices made the whole situation seem so surreal.

For my customer though, it was a very immediate reality. I then considered sending her a Western Union money transfer from her bank account to the nearest Thai Western Union office/agent. She was not aware that Scotiabank recently introduced wire transfer services and welcomed this first breakthrough with a mix of disbelief and hope. However, I knew that stringent security protocols prohibited me from performing an international wire transfer without her ScotiaCard security value which she didn't have. Consultation with my manager confirmed that these protocols could not be overwritten. I didn't want to come back on the phone and extinguish the first glimmer of hope that she had. This customer had no other means, she couldn't just dial 911; I was her operator. As such, I refused the cold impossibility of her situation and renewed my commitment to help her get through this dire predicament.

I then observed that system logs revealed that the customer uses ScotiaOnline Internet Banking. Western Union money transfers can also be sent via the bank's online services. As the customer confirmed that she could log in, her intermittent sobbing led to another moment of hope. I then assisted her to navigate to the Western Union subsection of ScotiaOnline where we

were faced with a final obstacle; an additional security access code was required. Without her ScotiaCard security value, the access code cannot be reset. At this point, I was so immersed in helping this customer that I caught myself holding my breath - and yes, she knew her access code!

I then located the Western Union offices nearest to her hotel via a Google maps search. Minutes later, we completed the wire transfer together. Furthermore, I called our Bank Card Security Department to insure that the wire transfer is not blocked for verification since it was her first time using the service. After bidding the customer good luck in picking up the funds, I left a voicemail for her parents with an update on the situation.

Hours later, after what seemed an eternity, the customer called me on my extension to confirm that she got the funds and could pay for her hotel room. The customer was as ecstatic as I was relieved. In a tearful and emotional expression of appreciation, she told me that she will never forget the help that she received. My colleagues, who were avidly following the call, were also delighted. It was very gratifying to hear that my resolution of this situation became a best practice among my peers who were able to assist stranded customers in a similar way in later calls. Empathy, emotional connection and creative problem solving can and do go a long way, literally thousands of miles.

A week later, the parents returned my voicemail and expressed their grateful thanks for assisting their stranded daughter. They were very impressed with the exceptional service that was provided by Scotiabank, a service they would not expect from their other main financial institution. As a result, they indicated that they were planning to move all of their business over to Scotiabank. Overall, I treasure this customer experience story as an inspiring and memorable illustration of World Class Care, every customer, every time and across the world.

Dalmar Godad - Scotiabank

## REVERSING BILL, POINTING FAMILY TO SUPPORT GROUP

*"After wiping the tears from my eyes, I put a smile into my voice and became an advocate for this family."*

"So often we try to alter circumstances to suit ourselves, instead of letting them alter us, which is what they are meant to do." Author unknown

On a normal Tuesday morning I answered a call with a very upset man on the line. He had received a bill for almost \$800.00 from an ambulance company. I had the man answer all of the verification questions which included verifying his date of birth. While on the membership screen, I noticed that the contract had not only the member, but also two children ages 6 and 4. I also have a 6 year old.

The next step for me was to ask who the patient

was for the bill that he had received. When he gave me the name I was puzzled as the patient was not listed on the membership screen that I just looked at. I began to look through the history to locate the patient. The patient, listed as spouse, was removed from the contract exactly one month earlier on May 8th. In an effort to locate the claim he was calling about, I asked for the date of service on the bill.

There was silence on the other end of the line. Finally, I again asked him for the date of service. This time, after taking a deep breath, he told me that the date of service was May 9th. I explained to him that the claim was rejected because the patient was not a member on the contract on that date. With a shaky voice on the verge of tears the member stated that he was aware of that, but asked if there was anything that I could do to get the bill paid. I hear a lot of excuses, daily, as to why a claim should be paid that was rejected, but none of that prepared me for what I was about to hear.

The gentleman on the other end of my line began to plead his case to me. He told me that he had to take a business trip that would keep him away for a week; he left on May 5th. On May 9th when his son and daughter got up their mommy was still asleep. They played quietly together in their toy room until they got hungry and she still wasn't up. His 6 year old decided to go wake mommy up for the day. When this little boy walked into his mother's bedroom he could not get her to wake up. He was very brave and called 911 from the phone at his mother's bedside. When the paramedics responded to the home, the boy took his 4 year old sister into the kitchen and gave her a pop tart for breakfast. The man then told me that it was discovered that his wife had passed away in her sleep that night, and based on her body temperature her death occurred May 8th. The man on my phone line tearfully told me that he provided the death certificate to his employer to remove his spouse from the medical contract. They removed his wife as of May 8th.

After wiping the tears from my eyes, I put a smile into my voice and became an advocate for this family. I contacted the employer group directly and explained the situation. After hours on the phone, I got to a supervisor who gave me permission to make an exception payment on this claim. I was able to call this man back with the good news that this bill would be paid in full.

I really felt connected to this family. I had only been back to work for 3 months after dealing with a very similar situation in my own personal life. I told this caller about my own situation to illustrate that I could relate. I gave him a list of support groups in his area and advised of my own experience with a particular support group which is a center for grieving children. I told him about my 6 year old and how remarkable he was dealing with the loss of his father because of the help that this place had provided to us. Before I closed out of this member's account I put a follow up on my calendar.

I called the member back 30 days later to see how he was doing. The day that I did the call back to the member was a day I will never forget. He went on and on about how thankful he was for all of my help. He told me that he decided to take his children to the support group, and that he would never have known about it if I wouldn't have gone above and beyond

to give him the information. His children are getting better slowly but surely. Then he said that his wife must have made sure I was the one to answer his call that day because she would have known that I could give him the guidance to get his children and his life back on track. At that moment I realized that he also helped me to deal with my loss and I am glad that I could make a difference for him because he certainly did for me.

*Amanda Fitz – Blue Cross Blue Shield of Michigan*

## PROCURING NEW VISA CARD FOR URGENT PASSPORT NEED

*"I could hear the relief in her voice."*

I firmly believe it is very important to be empathetic towards everyone, 'treat other people as we would wish to be treated ourselves' is the golden rule I practice on a daily basis. Not too long ago, I received a call from a customer. I could sense and feel that she was extremely frustrated since she could barely explain her situation. I began calming her down and assured her that I would be the one to resolve her issue. To comfort her and ensure active listening, I paraphrased and probed in order to understand and help with her situation. By giving her my complete attention and gaining her confidence, she explained her situation to me.

She and her husband were heading to the United States; she was travelling with him for a major surgery that he was going through. Sadly, he had a life threatening condition. She explained she was reluctant at first to confide in me since her husband was treated poorly already by the Canadian medical system. I empathized with her immediately seeing how I knew this was a difficult situation and wanted to help her to the best of my abilities, without adding any more grief than what she had already been through. She further elucidated that her husband required a new passport to travel down to the United States and had already submitted his Visa card number on the passport application form. However, she received a call from our Bank Card Security stating that her husband's card was compromised and all recent transactions had been declined.

Needing this passport was essential, and their Visa cards had to work while in the United States, so I immediately knew I needed to think outside the box. I noticed that Passport Canada had not placed the charge just yet, so I called Passport Canada and requested to speak with a supervisor, I explained everything in detail and we were assured that the passport would be rushed on a 24 hour urgent time-frame. Looking at the delicacy of the situation and wanting to ensure everything was done properly, I obtained the reference numbers and contact information for her and I also assured her that her husband's new credit card would be rushed to their destination. The whole time, I tried to relate to her situation. Everything will be just fine for them is how I reassured myself. Furthermore, to ensure everything would go smoothly for their trip, I got the compromised hold removed so both of them could make full use of their cards and I updated the notes to reflect they were travelling. I advised her of our convenient Global ATM Alliance, and gave her my availability, my extension and informed her we were accessible 24/7. When I showed her the benefits she had through her Gold Card, she thanked me and

stated that she did not even think about the insurance coverage she may have needed.

At the end of the call when I asked her if I was able to get everything resolved to her full satisfaction; I could hear the relief in her voice, full of tears, she was very grateful for my efforts and said, "I don't know how I can thank you enough but, God Bless You in every tough situation and may He always look over you." I was proud of how the call ended and it truly made my day!

I always reflect back to this opportunity I had to go above and beyond, and bring this to every one of my calls. I feel I did something good for someone who needed me, and I continue to be there for all of my customers, knowing the impact I can have by doing so. When you have a willing and helpful attitude it truly reflects in your efforts. By being nominated, I truly feel rewarded by my customers, my peers and my employer. With their input and guidance, I have been able to develop the behaviours that allow me to grow, not only in my career, but also as a person.

*Sabeen Sheikh - Scotiabank*

## DELIVERING ON A PROMISE BY ARRANGING CAR RENTAL

*"The owner of the car was very upset in that her son was injured and her car could no longer be driven."*

I recently took the report of a claim from a mother who was the owner of the vehicle. Her son, a new driver, was injured in a crash. It was not his fault. Unfortunately, this is the only vehicle in this house and the mother had a planned appointment that she couldn't afford to miss the next day. The problem was the car could no longer be driven. In our job, we usually only hear from people when they've had a stressful or negative event in their life. In this case, the owner of the car was very upset in that her son was injured and her car could no longer be driven.

Despite the growth of public transit and commuting alternatives, it's been my experience that we are still a 'car society'. People rely on their cars to carry many of their day to day functions. I try to never forget that when I deal with people on the phone.

This situation was exacerbated by the injury to her son, meaning she would need to get him to medical appointments as well as dealing with all the other things going on in her busy life. After taking the time to speak to the mother about her son and to assure her that everything would be well taken care of, I asked her to hold for a couple of minutes while I arranged for a rental car. I called the rental car agency myself and made sure they knew how important it was for this woman to have her car at a very specific time the next day. She was appreciative of my efforts, but did take the time to tell me a couple of times how important it was that she had the rental car the next day with no glitches. I told her I understood and assured it would be taken care of. I also made arrangements for her son to meet with one of our adjusters who deals with injury claims and again assured her that all would be okay.

The next morning, I came in to work early. I phoned the rental car agency to double check on the availability of the rental car. I was assured that the car was available and while I was on the line with the company, I was advised that the customer, the woman I was dealing with the day before, had just arrived and was extremely happy that the car was there and

ready to go. I was then able to get on with the rest of my day.

In our business, we sell people a promise. In exchange for an average premium of approximately \$1,000, we provide our customers with the promise that if something should happen, and they need us, we'll be there for them. At the call center, we get to deliver on that promise every day, but it's important that we remember that we usually only get one chance to deliver on this promise. I know that people lead very busy lives and that's why I like to resolve their issues the first time they call and hopefully with them only having to call us once. This isn't just the right thing to do. It's good business!! We live in a competitive world and we want to make sure that our customers stay with us. In this case, I'm sure that the mother I dealt with will keep her business with ICBC. I'm sure her son will make the same decision when it comes time for him to buy and insure his own car. It's my hope that they will tell their family and friends of the service they received and how their insurance company delivered on their promise.

*Ivan Jehangir – Insurance Corporation of BC (Claims Division)*

## PREVENTING POWER CUT TO WOMAN IN WINTER

*"The utility company argued that they were owed multiple months of payments."*

A few months ago, I received a frantic call from a customer who was worried that her hydro was going to be cut off in 5 days if she did not pay a huge electric bill. It was winter and the worst time of the year for something like this to happen. After listening to her situation and reassuring her that I would do my best to help her resolve her issue, she was able to calm down. Through asking clarifying questions regarding her circumstance, we were able to identify what the underlying issue was.

This customer was on the brink of having her power cut by her utility company due to unpaid bills and had a substantial balance owing. The utility company argued that they were owed multiple months of payments. She was given a 5 day period by her hydro company to get her accounts up to date or face power disconnection. She had moved a while back and said that she had made all of the required payments and had even called the bank on several previous occasions regarding the same matter and was upset each time because we could not help her with investigating or recalling the payments. The past payments being made to the utility company were being made from her spouse's ScotiaCard and the account was solely in his name. Then, she went on to explain that her husband is a fisherman and is out of reach for weeks or months at a time.

During my time with this customer, I was able to review her list of past bill payments and payees. I identified that she had been making her payments on time, but they were made on an outdated account number at her old residence. We had a very hard time investigating the payments with the utility company directly. They were not helpful or willing to co-operate because the account was not in her name. After numerous calls between this customer and me, she was able to reach her husband while he was out of town. We then placed a conference call with the manager of the accounts receivable department with

the utility company. They were willing to refrain from disconnecting her power if Scotiabank provided a written letter stating that payments were made by the customer to the incorrect account. I created an urgent case to send to Reviewapp and through the next several days, we were able to track, recall and transfer the payments to the correct account at the utility company. Through my negotiation with the utility company, they agreed to reverse the late fees, adjusted her balance and returned her account to good standing.

This customer was relieved and very complimentary of my efforts to go the extra mile to not only contact and deal with the manager at the utility company but also to finally resolve her issue. She was grateful because she said that without my help, she would have had her power cut off and faced hundreds of dollars in extra fees and charges. She was very thankful and appreciative of my extra effort and ownership in resolving her issue.

I always try to put myself in the shoes of our customers. I try to treat others as how would I like to be treated. This customer's appreciation, and the peace of mind knowing that I resolved this extensive ordeal, inspires me to keep providing excellent customer service. It has also inspired my fellow team members to go that extra mile as well. I believe that this customer will not forget this experience and I am happy that I was able to reinforce our mantra of 'Every Customer, Every Time.'

*Shant Demirjian - Scotiabank*

## BUILDING BOOKINGS FOR THANKSGIVING REUNION

*"The call ended on a positive note in spite of all the obstacles we faced."*

Building lasting memories and loyalty – here is a simple but powerful rule: Always give people more than what they expect! As a cancer survivor, I have learned life is fragile and to live my life as if every moment was my last. During my treatment the staff at the cancer center provided me hope, support, motivation and compassion. Having personally received such high quality care and service, it became evident that it was all about customer service.

Being a Travel Specialist covers two important things - caring and job knowledge. People want to know and feel that you care about them enough to help them and this resonates within me every day. Each call I receive is an important connection. It is an opportunity to demonstrate my understanding of the ethos of the company.

I received a call from a Collector who wanted to make a flight booking for her daughter for a long awaited Thanksgiving family reunion. I could hear the importance and excitement of this occasion in her voice. It should have been a simple reservation. However, after several attempts, all availability was sold out even after trying various other options. Feeling upset, irate and highly dissatisfied with our Program, the Collector stressed Air Miles never works for her. This experience compounded her belief of Air Miles. She asked, "What am I going to do now? I was depending on my Air Miles to get my daughter home for our family reunion?" Sensing the underlying despondency and despair, I knew she was ready to hang up. If she did, we would lose a valuable Collector.

I took ownership asking the Collector to give me

the liberty of trying something rarely ever offered, building a flight. I would build separate bookings and it would be slightly more expensive but it would get her daughter home for her long awaited Thanksgiving reunion. I created an itinerary with two separate bookings; my Collector was relieved and ecstatic that she was able to use her Air Miles. The call ended on a positive note in spite of all the obstacles we faced.

I was extremely satisfied and proud to have provided truly exceptional service and an everlasting impression with our Collector. We fulfilled our Customer Service promise to help Collectors' redeem their Air Miles keeping in mind the spirit of our corporate vision and goals. The successful resolution created renewed enthusiasm and passion to the Air Miles brand and retained a loyal Collector. Being part of the 'All Stars' team, with a positive attitude and passion for my job, I strive to assist and motivate my peers by allowing them to 'double jack' with me on a regular basis. We discuss the call and I provide tips and suggestions. I have received positive feedback from my leader and peers acknowledging that the sessions have improved their overall performance which, in turn, motivates them to perform at their best. We can all be true leaders in our roles by making a difference every day, one call at a time.

*Nazreen Abdulla – LoyaltyOne – The Airmiles Group*

## CALM RESPONSE AVOIDS CUSTOMER DEFECTION

*"The customer was ecstatic with Chris's level of concern."*

I had the pleasure of speaking with one of our tenured Rogers customers who was very impressed by Chris. The customer admitted that he had doubts that Rogers would address his concerns and was so frustrated that he was considering canceling his Rogers services. He wanted me to know that Chris helped to save a customer that day. After speaking with the customer, I reviewed the call so that I could hear what specifically Chris had done that really made a difference for this customer.

When Chris first introduced himself, the customer was so upset he could barely speak. "I want to cancel all of my services," the customer shouted. In his usual calm tone, Chris responded pleasantly and offered to see what he could do to help the customer. He also asked for permission to look into the overall situation for the client. It appeared that the customer had a credit balance on an old canceled account that had been written off; it was a small amount, under twenty five dollars. After Chris reviewed these details and received confirmation that this was why he was looking to cancel his current active services with us, he was able to get the customer to explain that it wasn't the amount of money that was the issue, it was the principle of the situation.

Chris listened and acknowledged the customer's concerns and feelings and also assured him that it was not our intention to offend him or to not provide him with a viable solution to his problem. Chris went on to emphasize that the customer was not overdrawn. Chris advised that he would get him his money back immediately. To prevent further frustration, Chris researched the situation without placing the customer on hold. He quickly realized what was causing the confusion and how he could resolve this for the

customer. Since the credit balance on the account was minimal, it was removed and Chris sent a request to our Customer Support and Investigation Team to have the funds returned to the customer's account. Chris sent the request promptly without missing a step and advised the customer that the credit balance would be refunded within seventy-two hours. Chris told the customer the steps he had taken to resolve his concerns and advised him that he would personally be following up on his account to make sure it was finalized. The customer was very grateful and further thanked him for his prompt solution and for taking the accountability.

At this time Chris did something that neither the customer nor I expected; he offered to look up the customer's current account and see if he had the correct services for his needs. Upon reviewing the customer's wireless account, Chris was able to alter the customer's services which resulted in him saving over ten dollars a month. The customer was ecstatic with Chris's level of concern. The customer did not cancel his services and requested to speak with me, to tell me about why he felt Chris was a definite asset to the company.

Again this is just one of many stories that myself and his colleagues, have about Chris. He is seen as a leader by his teammates, he participates in our team meetings by sharing his insights on possible solutions and when he returned from last year's SQM Summit he shared his learning with the team. I am very fortunate to have such a leader on my team.

*Christopher Ketel – Rogers National Customer Care*

## GUIDING WOMAN THROUGH STOLEN PURSE TRAUMA

*"I told her she could do this and we would get through this together."*

Nothing matters more to me than assisting my client with their unique needs. A very memorable call I had was when I felt that I was playing an active and supporting role in the turmoil that was very quickly unfolding in the life of one of my customers. The call came in late in the afternoon near the end of my shift. Upon answering the call I could immediately sense the panic in the customer's voice. She proceeded to tell me that her purse was just stolen. I could hear her struggling not to cry. Before I asked the standard authentication questions which are usually asked first I said, "Are you okay?" She stopped everything and said, "No, I feel like I am going to pass out right now." I asked her if she could sit down to talk to me and she did. I told her to close her eyes for a moment and breathe. I told her she could do this and we would get through this together. When I told her I would stay with her as long as she needed me to, it calmed her right away. She got her breathing back and when I knew she was calm, I asked her to tell me what happened.

The customer began by saying that she was in Prague in a 7-storey department store traveling with a good friend and she was leaving on the plane in the morning to go home. Her passport and all of her money, credit cards and ID were in her purse. She said she had set her purse down at her feet for only one moment to speak with someone, her hands were full of shopping bags, and when she went to pick up the purse, it was gone. She began to cry again and said she did not know what to do and security would not

assist her. She said that her husband was going to be very upset if she missed her plane. I could feel my own eyes filling with tears upon hearing her cry. I could only imagine what she must be going through and the sense of panic she must be feeling at this moment. It was bad enough that she lost her purse but the contents in her purse were her lifeline. All of her funds and ID required to get home were gone.

I knew that I had to stay strong and not let the situation affect me because she needed me to focus in order to help her. I continued to console her and I told her that everything would be okay. I explained that I took many calls of the same nature and that I would help her until she no longer needed my help. I started to ask the customer a few questions and located her information. I canceled all of her cards and reassured her that no one would be able to use them. I asked the customer if she would like me to connect her with her husband and she was overwhelmed that I offered. She agreed, and I was able to provide her husband with a list of numbers to call to alert any creditors of the potential identity theft. After speaking briefly with her husband, I took his banking information and he authorized me to send a Western Union money transfer to his wife's traveling companion since his wife had no ID. I provided the customer with contact information for the police and told her I would connect her with the Canadian Embassy in Prague to expedite the passport replacement.

When closing the call she thanked me, not in the way we thank someone for holding a door or for picking up an item we dropped, but in a way that tugs at your heart because you can feel in their voice that you truly did all you could and actually played a part in assisting someone get through an extremely unsettling experience. After leaving the call, I realized we had spoken for more than 50 minutes. I could have ended the call much sooner but felt compelled to see this customer through to the end of 'our journey'. There will always be another call waiting and another customer that needs help, but to truly go that 'extra mile' gives you such a rush of immeasurable fulfillment. I told this story to my daughter to explain my late arrival home. My daughter told me that the customer needed me more than she did and she was happy that I stayed to help. It is an honour for me to be able to share this story with you ... but nothing compares to experiencing these stories firsthand in my role at Scotiabank.

*Wendy Mackay – Scotiabank*

## OUTBOUND CALL FINDS CHEQUE FOR COLOMBIAN FUNERAL

*"The desperation in my customer's voice called for immediate resolution."*

A call was transferred to me at our Group Retirement Services Customer Care Center, from our Group Benefits Call Center. The CCR told me there was a customer on the line as well as an interpreter since the customer could not speak English. Although I could not understand what the customer was saying, I could sense in his voice he was already frustrated, likely from starting off in the wrong department coupled with the fact that English was not his first language. Within those few first seconds of the call, I could tell he was having a negative experience with the call center and Sun Life Financial as a whole. I knew it would be difficult to turn the experience into a positive one for

the customer but I had to try my best. Soon I would see just how difficult this would be.

I learned that my customer's grandmother, in Colombia, had passed away. He needed to send money to his family in Colombia to assist with the cost of the funeral. Although I could empathize with my customer, I knew I could never really understand his pain. This was going to be an emotional time for him. It turns out that a week prior, the customer requested a withdrawal from his account and asked for the cheque to be couriered. He still had not received the cheque. With the funds already being delayed, I knew I would have to do everything possible to get my customer his cheque.

With the assistance of the interpreter, I was able to assure the customer that I would get this resolved. During this exchange, the interpreter indicated that there was still a language barrier as the customer's Spanish was also broken, but better in Spanish than in English. I was extra careful to ensure that my voice remained calm so that the customer could pick up on my confidence in resolving this issue for him. The customer had received the courier tracking number from our call center however, wasn't able to track the cheque properly on his own. He felt completely in the dark as to where his cheque was. I was able to confirm that the tracking number that he was using was the correct one. I asked him to hold so I could personally go on the courier company's website in order to find out where the cheque was. The website stated the cheque was in Calgary, Alberta waiting for pick up. It turns out the delivery attempt had failed. I shared this information with the customer and quickly learned that Calgary was a 3 to 4 hour drive from Brooks, Alberta where he was living.

At this time, the desperation in the customer's voice grew and he was extremely upset. This money needed to get to Colombia as soon as possible. Normally, once the cheque is with a courier company, we would direct our customers to work with them to make arrangements to pick up the cheque. I knew this customer would be very hesitant to talk to them and he indicated he was worried that they would not have a translation service. I knew in one brief moment that I could turn this experience around for the customer.

I thought, why not conference all parties in on a phone conversation, which is something that is not normally done as we are an inbound call center. The customer was extremely grateful that I had offered to do this. So there I was on the phone with the customer, a translator and an unsuspecting customer service representative at the courier company. While on the phone with the courier company representative, we were able to determine that the cheque actually wasn't in Calgary, Alberta but in fact in Brooks, Alberta, the customer's home town. The representative was able to provide the correct address where the cheque was and we were able to relay this information to my customer. Immediately, I could hear the tone in the customer's voice change from desperation to elation once he realized all was not lost. He was so pleased that he would be able to pick up his cheque that day. Although I don't speak Spanish, I seemed to understand exactly what he was saying, just based on his emotions. He thanked me over and over again for taking the time to make the extra phone call right away.

In the end, the customer was able to get his

cheque and get the money sent to Colombia for his grandmother's funeral arrangements. Although making the outbound call to the courier company was not the conventional thing to do, the desperation in my customer's voice called for immediate resolution. The steps that I took and the patience of the interpreter ensured that everything had worked out for the best.

*Tyler Brown – Sun Life Financial*

## MOM WITH TUMOR IMPAIRING SIGHT GETS EARLY VISION CARE

*"There were tears on both ends of the phone line."*

Sherri had a caller that needed early services. She wasn't eligible for five months. Sherri was in the process of letting her know that an exam would be an

out-of-pocket expense for her when she told her story.

She was in her 30's. She had two young children and the one thing she loved to do is read to her children. The problem was that she was recently diagnosed with a brain tumor. The tumor was pressing on her optic nerve and causing her eyesight to change. She was going through chemotherapy and there was hope that the tumor would shrink, but it was doubtful that it could be removed. Sherri felt terrible for her situation. Sherri is a mom and loves to read to her own kids. The thought of her not being able to spend this time with them broke her heart.

The member wouldn't be eligible for an exam for five months, which was outside of VSP's guidelines for approving early services. Sherri knew that she would have the support of her supervisor to make the right

decision and the flexibility to do the right thing. With everything the member had to endure, the last thing she needed to worry about was if she could get a new exam and lenses so she could read to her children. Sherri decided to go outside of VSP's guidelines and approve new services for her. Not only could Sherri hear the smile on the other line, there were tears on both ends of the phone line. It made Sherri feel proud to work for VSP knowing that she would not receive any repercussions for doing what she knew in her heart was the right thing to do.

*Sherri Murphy – VSP Vision Care*

# GREAT CSAT CSR COACHING STORIES

NOMINATION STORIES OF TOP SIX FINALISTS FOR SUPERVISOR OF THE YEAR

## DEALING WITH UPSET CUSTOMER

*"She assured me I did the best I could with the situation."*

I had a very difficult call from a customer today who became extremely upset and I had to transfer the call to Patricia to handle. I ended up having to file an incident report due to some of the comments that he had made throughout the call, but Patricia managed to calm him down and help him the best she could. She always has a different way of explaining things and is always more than willing to help me if I have a difficult situation. Afterwards, she explained to me how she handled the call and how he probably just wanted someone with the authority of a supervisor to handle his concern. She assured me I did the best I could with the situation.

Patricia is always helping me develop my call center skills as I am really new to handling customers over the phone and she is a great person to talk to when I need help professionally and personally. She's always more than willing to discuss career options and paths I can take within the company. Patricia is the best!

*Patricia Burnett – Insurance Corporation of BC (DTVI)*

## LOOKING OUTSIDE THE BOX

*"It's his commitment that pulls the team forward during trying times."*

I nominate my manager, Jason Taylor. He is an excellent manager who taps into talents and resources in order to support and bring out the best in each of us. An outstanding manager who makes us think and helps us look outside the box, he is always committed to the success of the project and of all team members. He holds the vision for the collective team and moves the team closer to the end result. It's his commitment that pulls the team forward during trying times. When Jason shares my CSAT results, he provides me with tips to get every applicable call rated as a World Class call. He always emphasizes, before I finish the call, to always review at least one week of previous notes.

This is to ensure that all the concerns have been addressed and resolved in a professional and timely manner. Also, this lets the customer know that there is no pending request and the account is up to date. It helps customers feel special and have confidence that they are in professional and safe hands instead of feeling rushed. Since I have implemented this strategy, my CSAT results have consistently increased.

*Jason Taylor – Rogers Business Customer Care*

## FOCUSING ON THE DESIRED OUTCOME

*"She constantly reinforced that I possessed good judgment."*

I tend to be rigid in my approach to resolving customer problems and rarely stray from set procedures even when the situation warrants more creativity. While I have strong audits and SQM results, I felt I could better assist customers if I could only feel more confident thinking 'outside the box'. Wanting to increase my percentage of World Class Calls, which in turn would positively impact customer satisfaction with our company, I went to my supervisor, Amy, for help.

Through our discussions and coaching sessions, Amy helped me feel more confident about my skills. She constantly reinforced that I possessed good judgment and always had the customer's best interest at heart. Her support helped me think 'outside the box' and feel more comfortable making decisions that didn't necessarily follow our exact procedures, but were still supported by VSP.

Amy and I listened to calls together. She had me focus more on the desired outcome instead of the method to get there. She also let me sit with other CSRs with strong skills so I could learn different techniques and see that our company supported creativity in the pursuit of resolution.

Last year I had my calls rated World Class. This year my World Class percentage increased. I'm certain I could not have improved my score without Amy's guidance and continued support. Amy makes me feel good about the job I'm doing as a CSR. I think she

is a quality supervisor deserving of recognition as Supervisor of the Year.

*Amy Kelly – VSP Vision Care*

## AN INSPIRING ROLE MODEL

*"She consistently reviews the feedback with me from the customer surveys."*

I would like to nominate Vivianne for the Supervisor of the Year. She is an inspiring role model and regularly provides feedback and coaching, helping me to achieve my monthly and quarterly targets for SQM. She consistently reviews the feedback with me from the customer surveys, coaching me to recognize areas of opportunity to improve my CSAT results. Typically, I would receive 15-20 surveys from our Rogers Business-Corporate customers. She reviews their feedback and helps me to focus on areas of opportunity providing honest feedback on improvement opportunities.

I would like to take this opportunity to provide my feedback as a small token of appreciation. Vivianne empowers my teammates and me to reach our full potential in personal and career goals. During my time on Viv's team, I have come to rely on her leadership skills and guidance to reach my full potential with regards to my personal and career goals. Viv is very committed to helping her team achieve success in both personal and career objectives. I feel that I can speak on behalf of my team when I say that she has provided us with the support and tools needed to empower everyone to reach their full potential and be successful. An example that comes to mind is when she worked with me to coordinate the 'Rogers Walk-A-Mile' program. From the start, this was a bit of a challenge as the IT department here at Rogers is very big and finding out exactly who to contact was a problem. She went above and beyond to actively contact multiple managers to get me in contact with the right group. With her help and support, I was able to book a day at the Rogers Brampton campus and experience what it was like to sit side-by-side

with several IT representatives which I found very informative. Thanks Viv for helping our team to transcend boundaries, allowing us to think creatively and strive for success.

*Vivianne Karaoghlanian – Rogers Business Customer Care*

## HELPING REACH A LOFTY GOAL

*“Lisa and I spent a lot of time listening to calls together.”*

I went to Lisa because I wanted to obtain a 100% world class call rating on every customer survey. It's very important to me that every member is very satisfied with their resolution because I know this reflects positively on their view and loyalty to VSP. In turn, this helps VSP win more business. I also enjoy a personal challenge. Plus, only one CSR achieved this recognition for VSP last year. I thought accomplishing this goal would boost my confidence and inspire my peers to stretch their goals.

Lisa let me know she believed I could accomplish any goal I set for myself and she regularly told me that she had the utmost confidence in my call handling skills. This gave me the conviction to tackle such a difficult task. Lisa and I spent a lot of time listening to calls together. We analyzed them by components to identify specifically what I could do to positively impact resolution and satisfaction on every call. For example, one key area we identified was to carefully listen to what the customer needed. By focusing on this element and giving the customer what they truly wanted, I was able to increase my performance.

We often went to the SQM website to review qualifications and read what other CSRs had done to

dazzle their customers. We used these ideas to modify my approach. I have increased the number of World Class surveys I have in 2010 compared to 2009. I couldn't have done it without Lisa's encouragement and coaching. This is why I am nominating her for Supervisor of the Year.

*Lisa Elliott – VSP Vision Care*

## GETTING A SECOND CHANCE

*“Michelle immediately made me feel welcome just with the warmth of her personality.”*

I began my career at Sun Life Financial on a temporary 8 month contract. During that period, I was learning the skills necessary to be a Customer Care Representative, but my lack of confidence on the phones was holding me back from truly succeeding. Coming out of training, my test scores were fantastic. However, without any previous call center experience I was having trouble believing in myself. My nerves truly got the best of me and it affected all of my metrics including the most important one, Voice of the Customer. I struggled to come close to even the minimum requirement for World Class certification. Unfortunately, at the time, there was no room in the budget for me to earn a permanent position with the GRS Call Center and I was let go at the end of my contract. To my surprise, later that year, I received a call from Sun Life Financial asking me to return to my original position on a permanent basis. I was very excited for the opportunity and glad I was able to obtain a second chance.

As my new supervisor, Michelle immediately made me feel welcome just with the warmth of her personality. She made a point of letting me know

how confident she was in my abilities as a Customer Care Representative, despite my struggle in the past. Michelle recognized this and went out of her way through coaching and positive reinforcement to help me believe in my abilities. Michelle's belief in me really inspired me as a CCR. I most certainly did not want to let her down.

While continuing to help build my confidence, Michelle has also helped me develop superb customer service skills. She took the time to guide me on some of the finer skills of customer service. Michelle would pull my calls that were not World Class and took the time to listen to them with me. She could have just sent me the calls to figure it out on my own, but she didn't. My customer service skills and efficiency were improving and I could actually see my results improve!

Through coaching sessions, Michelle expressed the significance of first call resolution by helping me understand and see situations through my customer's eyes. She provided me with helpful tips, such as how to phrase explanations to sound more positive. She always stressed that I am the expert. I control the call. It is my responsibility to do everything in my power to resolve that call, no matter how complicated or stressful the situation. Whenever I feel a call or situation is on the verge of falling out of my control those words of wisdom are remembered and help me through the call.

Today is my one year anniversary with Sun Life Financial. Thanks to Michelle's great leadership and coaching I am confident I can resolve any call or any situation that comes my way.

*Michelle Geisel – Sun Life Financial*

# GREAT IMPROVEMENT STORIES

## 2010 TOP 10 CSR FOR WCC IMPROVEMENT FINALIST STORIES

### DISCARDING A DEFENSIVE ATTITUDE

*“I stopped the excuses and improved one day at a time.”*

How was I able to improve my World Class Call results over the last 12 months? The answer is pretty easy actually. Prior to last year, I was not receptive to feedback. When my supervisor would meet with me and provide me with feedback and constructive criticism, I would get very defensive. I believed that I didn't need another person's advice to get better. I was answering the customer's questions and that's it, my calls were not personal.

This attitude got me nowhere. I was not meeting my objectives and was disappointed with my results. This year I decided to do better, to be better. My supervisor and I had discussions about my goals and what I wanted to achieve and I knew that I had to work harder to get there. We listened to some of my calls together and I was open to her feedback. I did not always agree, but I understood what she was saying and took all of her feedback in a constructive manner. All of the advice that has been given since then has been put to good use. One of the main tools

I have focused on using is positive positioning and I have been incorporating it in all of my calls. I take the time to tell the customers all of the options which are available to them and sometimes it's as easy as simplifying the answer to their question. I listen to them and I always try to bring positive points out of negative situations. Sometimes, when it can change the issue around, I will find a way to help them by going totally 'outside the box' with the solution. It might take some more time on the call, but the end result is worth it as the member is satisfied with my service and this is a direct reflection on the company. I have also worked hard at personalizing my calls. Sometimes, simple acknowledgements such as: thank you, have a good trip or even, happy birthday, can make all the difference between a somewhat satisfied customer and a very satisfied one. I really try to understand the customer's perception and do what I can to ensure that it is a good one.

Bottom line is, in order to improve my customer satisfaction results and get more World Class calls, I worked on myself. I stopped the excuses and improved one day at a time. I have never been asked to be the

best, but simply to do my best. Now I can easily say that every day I give my best and provide excellent customer service to our members. This has directly reflected in my results by improving my World Class Call results compared to last year. You don't have to be perfect to succeed, but there are always areas for improvement. I learned that the hard way and now that I have grasped that understanding, I am getting better and learning something new every day. I maintain a positive attitude and keep smiling, knowing that with the momentum I have right now, I will definitely be one of our WCC Certified representatives when the end of the new SQM year comes.

### CREATING INDIVIDUAL DEVELOPMENT PLAN

*“She now tries to keep the caller on the line while explaining what she is doing.”*

She increased her scores from 2009 to 2010. Her focus had been on improving her overall results. In fact, she had improved her Calls Resolved, CSR Customer Satisfaction and Call Center Customer Satisfaction. During our coaching sessions we developed an Individual Development Plan which helped her to focus

on what she could do to improve her SQM results and then we discussed what actions and/or behaviors she needed to adjust to realize her goals. For example, her hold time was pretty high. She began to understand that by putting the caller on hold, the caller might not have felt that she valued their time. She now tries to keep the caller on the line while explaining what she is doing. This has helped her connection with her callers because they feel they are part of the process and/or they know what is going on. She also focused on the length of her calls. Instead of keeping the caller on the phone while she documented information, she gathered the information needed and completed the documentation after the call ended. She not only improved her World Class Call results, but also her internal audits. She increased her opportunities to show our members the value of their benefits. She is very proud of her results and feels they have boosted her confidence to next level of servicing our customers!

### RELATING TO OTHER PEOPLE'S PROBLEMS

*"I do know that my compassion for people has really grown..."*

I am pleased to nominate this CSR for the World Class Calls Improvement award. In 2009, it was disheartening for her to get survey results and she felt like she was unlucky with which customers that were surveyed - 'the luck of the draw'. Well, month after month, we talked about ways we could influence certain aspects of the call. She certainly found her stride, and it shows, in her average year-to-date CSR Sat, FCR and Top 5 Metrics. She has improved in every measure of SQM. Here is a quote from her, "I do know that my compassion for people has really grown because of what I have been going through recently with my friend who has terminal cancer. My thought behind every call I get is that everyone has a story or everyone is going through their own difficulties. The way I deal with each call can really have a positive impact or negative impact on their situation in that moment. So I guess it comes down to being more customer focused and remembering that this is one of our key strategies."

### APPRECIATING EACH CUSTOMER CONTACT

*"Her focus on doing the right thing for each customer exemplifies our customer care objective."*

Our nominee is a hard worker who is dedicated to providing an enhanced customer experience during each and every contact she makes with the customer. She works well with her peers and celebrates her team's successes. She has a positive attitude and takes every opportunity to appreciate each customer she comes in contact with. One of the challenges for her late last year was her First Call Resolution scores.

Her manager asked her to come up with one thing that she would do differently on all her calls that would have an immediate impact on customers. She put herself in the customers' shoes and then analyzed the customers' expectations. An example of feedback I commonly hear from customers is, 'I was promised a call back and no one ever called me back'. This was something that she decided to change for all customers that she spoke with.

As a billing consultant, one of the key issues that she struggled with was the fact that the customers did not see any changes to their bills until the next bill was generated and sometimes they were skeptical.

She started offering call backs to customers when she felt they were hesitant on the resolution that she had provided. Most of the customers found this very surprising, but what surprised them even more was that she did follow up to confirm if everything was okay on their bills.

Back in the month of May, she received a commendation from a customer who was extremely impressed with her customer service. This customer had called in multiple times before and was hesitant from the 'get go'. This was his second call of the day to get clarification on his invoice (he had called in before and was transferred without being notified). When she got this call the customer was very upset and wanted to speak to a manager. She acknowledged the customer's frustration and assured him that she would not transfer him, but rather, assist him with any questions he may have. By assuring the customer and demonstrating a willingness to assist, she was able to resolve his concern. She then called the customer back the following month to make sure he understood his new invoice.

While reporting to me, she has demonstrated excellence when dealing with customers. Her focus on doing the right thing for each customer exemplifies our customer care objective. We salute her and thank her for making a difference.

### PERSONIFYING FIRST CALL RESOLUTION

*"She attributes her achievement to listening more and talking less."*

At last year's World Class CSR banquet, our nominee heard the story about a CSR who had achieved 100% World Class certification. From that moment on, she made it her personal mission to strive for that achievement for herself to provide that level of excellence for our customers. In 2009, she had earned a high percentage level on her World Class performance, but not being content with that level she went on to achieve an even higher percentage level of performance for CSR Csats, Call Center Satisfaction and Call Resolution.

She truly personifies first call resolution through listening, giving all her attention to every caller and making sure she has addressed their concerns. By doing this she was able to reach a remarkable achievement. It is very difficult to reach that level of satisfaction. We discuss her results every month and she learns from every customer interaction. In the past, she would sometimes get hooked in her desire to make a situation right. Now, she attributes her achievement to listening more and talking less. She really tunes in to what the customer needs and wants, so that she can acknowledge and act on it. This has had a tremendous impact on our customer's satisfaction.

### UNDERSTANDING CUSTOMER RETENTION IMPACT

*"I end the call in such a way that I remind them what we discussed or resolved."*

He has increased his World Class percentage from the last certification period. Recently he won an internal award for his Voice of Customer surveys. He understands that his interaction with each of his callers has a direct impact on retaining customer loyalty. He also truly appreciates the important role that the Voice of the Customer has within our organization.

This is what he had to say about his main focus during this certification period, "I always ensure I meet my caller's needs thus supporting member satisfaction

and first call resolution. I completely respond to the member's needs (voiced and not), I confirm the reason they called, I end the call in such a way that I remind them what we discussed or resolved, as well as giving the caller an opportunity to ask if they had any additional questions not yet addressed."

In the comment section on his SQM Report Card, common themes used by his callers to describe their experience with him include: knowledgeable, informative, thorough, answered all questions, efficient, clear and concise, professional, courteous, friendly, good listener and goes the extra mile. Our callers recognize the customer service he provides often exceeds their expectations.

This is evident in calls transferred to a supervisor complimenting him on his outstanding customer service. Direct feedback from our callers include: He was very prompt with answers to my questions; displayed a clear understanding and was extremely efficient; I was very happy with the friendly and immediate assistance I received; he really listened and was very patient; he made me feel so important; he is the best rep ever; I'm just ecstatic; he was fabulous; he was so patient and so professional. I really appreciated that; he went beyond what a normal Customer Service Representative does; I was impressed; I used to work in a Customer Service industry so I do understand what you go through.

### EMBRACING QUALITY CUSTOMER CARE

*"She has focused on implementing recommended concepts on each interaction..."*

In the last year, our nominee has had the most profound improvement in her customer interaction results and in her ability to balance the expectations that our customers and organization have of frontline agents. Watching her grow and develop her customer service skills over the past year has been a pleasure for me, both as her manager for the brief time she has reported to me and as a senior coach at our site.

She is committed to embracing quality customer care on every interaction, every day, which is evident in her amazing improvement on her SQM customer survey results. With the help of her managers, she has focused on implementing recommended concepts on each interaction that she has with her customers. Many of the techniques that she and her manager worked on to help improve her customers' experiences were really focused on leveraging the recommended skills while also focusing on how she could respect their time and make herself more available to her customers. The weekly benchmarking of her results with her manager, along with listening to one of her calls every two weeks and then debriefing with her manager, have helped her become more aware of the little things she could do to make a big difference in her customer interactions. She learned and implemented that communicating with the customer about the live hold would help her better manage the customer's expectations about live hold. Her learning made a difference in how the customers reacted to the hold and also helped her become more efficient and accountable to her customers. This was further enhanced by her ability to ensure that she was actively listening to her customer's verbal queues and information before responding and asking for clarification. These techniques ensured that she was creating positive defining moments with her customers and that

she was respecting their time while getting to the root issues so she could resolve issues quickly and accurately for them. She is now very proficient in handling any call type. She is utilizing these techniques and focusing on displaying that she cares to her customers through her positive, calm tone and word choice.

If you ask her what is the key to excellent customer service, she will tell you it is to demonstrate interest and concern by listening attentively, projecting a willingness to help and conveying respect. She is very modest about what she has accomplished in the past year and will tell you that she hasn't done anything spectacular other than listen, acknowledge and do her job. In my observations of how she deals with her clients I also note that she never loses her patience with customers, no matter how they are and ensures that her customers have a productive outcome from their interaction. I am impressed with how she will now use affirmation and assurance statements in her calls to reduce any negative feedback or impressions that the customer may have of our organization's services or representatives. This further supports why I have received feedback from her customers which says that she is patient with them and that they feel that she genuinely cares about their situation.

One of our valued customers had this to say about this agent after she had the pleasure of speaking with her: "I was very satisfied with her customer service; she was able to answer every question that I had. She was extremely courteous and knowledgeable; this was the best service I have had with any customer service agent ever!" She remains dedicated to excellence in customer service today, and we will continue to work together to help her achieve her goals. I would like to share that when she was told she was SQM certified and was being nominated as one of the most improved agents she responded with, "I will continue to help all my customers to the best of my ability every time!" This just shows how she approaches each situation and how even little changes can help make a difference in how our customers perceive us as representatives and as their service providers.

## STRIVING FOR CUSTOMER SERVICE PERFECTION

*"She put herself in the customers' shoes."*

When it comes to customer service, our nominee is a perfectionist. She doesn't accept poor service from anyone, especially herself. So when she learned she missed certification last year she asked, "How could this happen?" She knew that she always answered the customers' questions accurately. She was efficient, accurate, and despite being relatively new to our organization, a good CSR. She blamed customers, the organization, resources, computer applications, etc. until finally settling on the main problem - herself. After reflecting for a few days, she had another conversation with her supervisor. They discussed why she was not consistently achieving World Class rated calls. She left the conversation disappointed but determined.

She discovered the main problem was her approach. Yes, she answered the customers' questions accurately and specifically, but that's all she answered - their questions. She was looking at customer service as a customer service representative, not a customer. And that's when it all changed. From that moment on, she put herself in the customers' shoes. She asked herself, what do they need to know but don't know to

ask? She started asking the customer questions. Immediately, she saw improved scores and an increase in compliments from her customers. Not only did she receive more recognition, but she also started feeling a stronger sense of pride about the job she was doing.

Customers have expressed satisfaction based on their conversations with her and this has resulted in an increase from last year's score! She is more confident in both her approach and the level of service she provides. She passes along this service ethic to our trainees as part of her new role as a division mentor. She has truly earned her distinction of World Class Certified.

## ADDING THE PERSONAL TOUCH

*"She has been able to adapt verbal skills that ensure the customer has a positive experience."*

As this CSR's supervisor, I consistently hear the care she gives each of her customers. In our business, you are dealing with an unfortunate situation where you need to gather details in order to process the claim yet create a positive customer experience. By treating her customer as a person and not a policy or a process, she has been able to increase her World Class calls this year. She recognizes that connecting positively with the customer is one of the most important parts of the job, "The personal touch to calls rather than a process", as she so perfectly puts it. With her moving to the call center environment just less than 2 years ago, it was a learning curve to now exhibit care, help and empathy, verbally over the phone versus face-to-face.

In reviewing SQM surveys and listening to calls, she has been able to adapt verbal skills that ensure the customer has a positive experience and that they are being treated with respect. She recognizes her customers' needs whether it's efficiently gathering the details and setting up the claim so the caller can carry on with their day, or spending time listening to the caller who wants to converse; it's the personal touch. An example of her care is when she answered a call from a very distraught customer. Concerned for this customer's safety, she contacted the local authorities who went by the residence and provided assistance to the customer.

## LEAVING THE NEGATIVITY BEHIND

*"This pact to go the extra mile would help me more than I could ever imagine."*

In 2009, I was not a World Class certified representative. I acknowledge that, unfortunately, my focus just wasn't where it should have been - our customers. I was leaving the call center on maternity leave in the middle of the year. Before leaving, I had formulated the plan that once my leave ended, I was not coming back to the call center. Knowing I was going to leave, subconsciously I wasn't performing to my full potential. I wasn't giving the World Class service that I had always displayed to our customers in the past. My customers deserved to have my full attention. While on maternity leave, I had gone through some drastic life changes and was forced to shift my priorities and put complete focus on my personal life. I also made the decision to come back to work earlier than I had anticipated. Digging deep, I knew with all of the tough changes in my life, I needed to do some hard work on my attitude. All the negativity in my life had to be left behind. I made a promise to myself, I was going to start fresh and give each and every customer my full attention. This pact to go the extra mile would help

me more than I could ever imagine.

The first change I made was to actually listen to my customer. I would paraphrase the customer's question right back to them. This definitely ensured I was focused at all times. I also started explaining things differently. I started talking to customers, using language that made sense to them.

The second change I made was when I understood that when I was speaking to customers, I never really gave them more information than they were expecting. At that time, it didn't occur to me that by providing the appropriate extra information meant they would not need to call back - first call resolution!

I recognized that some customers may have questions that they don't ask because they can't verbalize their thoughts on some of the difficult topics. The third change I implemented was adding empathy to my conversations with my customers. I really struggled with that in the past. It can be difficult to show empathy to a customer when you don't see them face-to-face. When I tried to convey a feeling of empathy, it felt like I wasn't being sincere. Luckily, once I made the decision to really listen to the customer and to show my empathy, everything seemed to fall into place naturally. Knowing how I had to live through my own struggles, I could recognize that everyone has tough events to deal with. This was a big realization moment for me.

Before I left the workplace for my maternity leave, my World Class percentage was lower than I wanted. When I came back from my maternity leave and with the changes I implemented, I immediately noticed an amazing positive change in my SQM World Class results. This fueled my passion to continue on the path of exceptional customer service. At the end of this SQM year, I can truly say how very proud I am that I have improved my SQM World Class results. I have no plans to look back on my less than stellar results.

Recently, I have been rewarded with the opportunity to mentor colleagues on my team that are struggling with their customer service results. I am now a full time Learning and Development Specialist with our call center. It is up and away from here!

## ABOUT SQM GROUP

Since 1996, Service Quality Measurement (SQM) Group has been a call center industry leader for improving our clients' operating cost, customer service and retention. Some clients have improved their FCR performance by as much as 12% within 30 days of implementing SQM's FCR best practices. Our research also shows that when you improve your FCR, not only do you achieve operational savings, you also reduce customers at risk which is typically a 5-10 times greater savings opportunity than the operational FCR improvement savings.

Our post-call surveying methodology continues to be leading edge. SQM conducts live surveys through our own dedicated workforce or use our in-house IVR, web and email survey technology. All post-call survey methods can be integrated into one common database. We can also survey within 5 minutes of the customer's call without having to rely on a transfer into our technology. Our call list management system allows us to accurately deliver a survey quota at a customer representative level or any other survey quota level that is required.

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**We're thrilled to announce that one of our Associates has been named amongst the Top Finalist for SQM's Annual Call Center Awards Program**

***Congratulations to:***

***Nazreen Abdulla** for being among the finalists for CSR of the Year Award*

*In addition, we'd like to congratulate **Claudia Camaya** for achieving "Supervisor World Class Certification"*

SQM benchmarks over 400 leading international call centres on an annual basis and conducts over one million surveys with customer who have used a call centre, email, website or IVR contact channel service. Based on its call centre benchmarking studies, SQM awards excellence in service quality for the call centre industry.

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