

# CASE STUDIES

## Call Centres



## The KONA Group

because

“Hope is not a Business Strategy”

Over the last 17 years The KONA Group has become renowned as the 'go to' company for organisations looking to ensure their Leaders, Managers and People perform at the level required to ensure strategies are executed, performance objectives are achieved and critical business results are delivered.

Each member selected in the KONA team is a highly skilled business improvement specialist who works with our clients according to the specific skill-set and expertise required in each project.

They are NOT theoretical 'by the book' trainers or academics who have never run a business, managed a team, or built a Pipeline

## Sales Team Not Making Enough Client Appointments

### Initial Situation

- 57 consultants making an average of 1 telephone appointment a month (per person)!
- Sales and revenues declining
- Morale starting to drop
- Not engaging with clients over the phone
- Not tapping into clients 'triggers'

### KONA Solution and Action

- Introduced a weekly 'Power Hour'
- Coached Managers on how to motivate and drive a Power Hour with their teams
- Developed tools, processes and competitions to motivate the team
- Developed skills to engage with clients, then rehearsed, before hitting the telephones!

### Outcomes:

- In **one hour** the team made 361 appointments!!!
- Resulted in a huge increase in new business
- Weekly 'Power hours' now established and increase in appointments has continued

## Not for Profit Sales Team Not Making Enough Outbound Appointments

### Initial Situation

- Relying on TV and Radio lead generation campaign but not converting inbound leads
- Under pressure from government to maintain funding as not achieving business KPIs
- 2 teams of 19 people in each team
- Both teams making less than 1 telephone appointment a month!
- Team complacent and making excuses
- Managers not driving activity

### KONA Solution and Action

- Introduced a weekly 'Power Hour'
- Coached Managers on how to motivate and drive a Power hour with their teams
- Developed tools and processes and competitions to motivate the team
- Developed skills to engage with clients, then rehearsed, before hitting the telephones!

### Outcomes:

- In **one hour** one team made 157 appointments!!!
- The second team made 135 appointments
- Total increase of 800%
- Government KPIs now being achieved

## Well Recognised Credit Card with Inbound Call Centres

### Initial Situation

Worked with 2 different teams including Credit Card Retention team and Inbound Customer Service

- Not hitting their targets consistently
- Team Leaders not skilled in people coaching
- Have product, knowledge and systems training however lacking in essential communication skills
- Don't handle conflict with customers well
- Accept the first reason the customer gives to close their account
- Need to improve their questioning and probing skills to uncover the "issue behind the customers' reason for cancelation of their credit card"
- Lacked "Engagement"
- Culturally didn't understand customers

### KONA Solution and Action

Implemented KONA'S 4 phase **A C T C** approach:

- (1) **Assessment** phase to understand the business, challenges and opportunities, and identify the current and future levels of development required for each individual
- (2) **Consulted** back to clients management team and jointly developed training content and delivery format. The training development included:
  - A "themed" approach designed to assist the Customer Retention Team "embrace a more exciting and sales oriented culture" and "shift the paradigm"
  - Specific, tailored skills development modules for CSOs with particular emphasis on engaging more effectively with customers, gathering appropriate and relevant information from customers and achieving higher customer retention rates
- (3) **Training** modules focussed on increasing the sales team's "softer skills" so they were to communicate more effectively with customers, to gather appropriate information from the customer and where possible to retain them
- (4) A strong emphasise on follow up and **Coaching** to ensure any training content is implemented and reinforced in the field and not left in the 'classroom'

### Outcomes

- In first 6 months increased customer retention from 32% to 45%
- In second 6 months achieved a further increase to 52%
- Team Leaders now Performance Coaches
- Business Leader rewarded and promoted to a more senior role
- Program now integrated in Induction program and as a way of working

## Global Bank with Call Centres in Australia

The successful implementation of business initiatives may be compromised because of the skill base of CSOs

- The lack of confidence of CSOs in their ability to sell the new or changed products, in particular the insurance products, will have a significant impact on all matrixes, in particular the sale matrix
- The “tool box” of CSOs lacks depth and as a result the CSOs do not have the flexibility required to adapt to the myriad of customer situations and to explore the options available to the customer
- CSOs lack ownership of the customer call and the customer does not feel inspired to commit
- Sales happened in an unplanned/non-strategic manner; this lack of focus was not sustainable in the new environment and would limit the ability of the team to achieve the “stretch” targets

### Customer Service

- CSOs sound bored, uninterested; some seemed impatient with the customer
- CSOs do not always indicate willingness or desire to help the member, over and above the minimal delivery of service – there were a few exceptions
- Transactional process vs relationship-building
- CSO does not instill confidence
- Many silences occurred without explanation to the customer
- Knowledge varies – CSOs often do not know *what* and *how* to respond
- Empathic phrases often sound insincere

### Sales

- Little initiative used to generate an offer
- Many “offer” opportunities missed; little or no positioning of the product
- Conversion of offer to sale occurred predominantly when offer requested by the customer
- Most CSOs perceive themselves as customer service focused and not salespeople
- Calls lack structure
- Little demonstration of listening
- CSOs do not have problem resolution attitude or approach
- Lack of clarity in understanding of member’s query – limited probing

### KONA Solution and Actions

- Implemented the KONA ACTC process
- 'Double Jacking' telephone calls listening in to measure quality of conversations - (see matrix above)
- Developed several training modules for Customer Service Officers (CSOs) and Team Leaders including....

#### Customer Service Officers (CSOs)

##### Module 1: Understanding Sales

##### Module 2: Generating the Offer

**Module 3: Converting the Sale**

**Module 4: “Call Management”**

**Module 5: Individual Coaching**

**Team Leaders - Managers as Coaches**

**Module 1: Your role as Coach** (Delivered prior to Modules 1&2 CSO training and immediately after)

**Module 2: Group Coaching**

**Module 3: Listening Sessions**

**Module 4: One on One Coaching**

**Module 5: Listening**

### **Outcomes**

- CSat (Customer Satisfaction) scores increased by 12%
- Wider range of products being sold off the 'palette'
- Established a long term training program that is now being rolled out internally
- Program a crucial part of induction