

USING CALL RECORDING TO OPTIMIZE CONTACT CENTER WORKFORCE MANAGEMENT

By Roland Murphy

Regardless of the industry, contact centers face a host of challenges in getting the most from their agents. Factors such as low morale, scheduling difficulties, maintaining appropriate staffing levels across shifts, and minimizing turnover are problems every manager faces.

The medical contact center has its own unique challenges. Its agents must receive a much higher degree of training than, for example, an agent in a commercial contact center who processes orders for merchandise. Because of this greater degree of training, the time between when agents are hired and when they start producing results is greater, as is the time and money invested in them. If they leave, then you're out the money spent training them *and* the money to train their replacement. Fortunately, making full use of a call recording solution in the medical contact center can help minimize pitfalls and maximize the return on staff investment.

Real-World Training Using Call Recordings:

The first key is real-world training. Before call recording was an option, training largely consisted of reading manuals and engaging in role-play, which could be tedious and possibly ignore some common situations if the program developer didn't consider them prior to the manual's printing.

With a modern recording solution, it's easy to build a training library comprised of both calls that are handled in an exemplary fashion and those that offer room for improvement. By listening to calls regularly, managers and other leaders get a feel for what's actually happening in the contact center – rather than what they *think* is going on – and select the best examples to incorporate into the training regimen.

Agent Engagement in Evaluations Helps Ensure Improved Performance:

Call recordings have long been used in the agent performance evaluation process. Since they objectively relate exactly what was said and by whom, they are highly useful in checking items such as script adherence, tone, helpfulness, and process compliance.

How that review takes place can have a vital impact on performance. If a manager merely reviews an agent's calls and issues a report, a crucial opportunity is missed. What the supervisor *should* do is review the calls *with* the agent, noting first his or her strengths and then presenting what areas need improvement, bolstered by examples.

Telling the agent, "When you were talking with Mrs. Jones, you did X. You should have done Y," is far less effective than reviewing the call together and then asking, "What could you have done better here?" This approach brings the agent into the process and is more effective in improving future performance. Certainly, it puts the agent on the spot, but because he or she will fully engage to find the answer and end the exchange quickly, it's likely the lesson will be better retained since the agent won't want to end up "in the hot seat" again.

Consistent Call Review Improves Workforce Optimization:

Calls need to be reviewed regularly. All too often, reviewing and evaluating calls is considered a point of flexibility in the supervisor's schedule. Schedules get busy or issues pop up on a shift; before you know it, no calls have been reviewed. Break the cycle too many times, and a supervisor will get out of the habit of reviewing calls altogether.

Make reviewing and evaluating calls a regular requirement for supervisors. Set a minimum number of calls per shift to evaluate, and make meeting that objective part of the supervisor's performance review. Make sure not to set the number too low, since the supervisor might only review the minimum.

Modern call recording solu-



tions have built-in evaluations and scoring modules. Customize the questions to fit your particular contact center. If your solution allows you to rank some questions higher than others, do so. Supervisors are the input when it comes to business intelligence and workforce optimization. Make sure they consistently give you the degree and volume of data you need.

Motivation Beyond the Paycheck:

Agents' paychecks cannot be their only source of motivation to do the job well. If it is, the moment someone offers them another twenty-five cents an hour, they will be out the door, and you will be out their expertise and the time and money it took to develop. Call recordings make great tools in creating an effective motivation program. Routinely share outstanding calls with the team. A public "atta boy" rewards agents for doing the job well, contributes to their sense of value within the team, and doesn't cost the company a penny.

Another recording-based contributor to agent motivation is implementing a "call of the week/month/quarter/year" contest. When an agent has a particularly good call, let him or her nominate it. Pick four or five entries from the weekly pool and let agents vote on which call they thought was best. Give the winning agent a small cash reward. Then at the end of each month, allow the agents to vote again for one of the four weekly winners. This monthly winner would receive a slightly larger reward, and awards would continue for the quarter and the year.

A \$25/\$50/\$100/\$1000 prize pool is not unreasonable. This amounts to \$3300 annually, which is not an insignificant amount, but it's cheap if even a quarter of your agents become motivated enough to actively participate. Once a few winners are named, the odds of that motivation increasing are likely.

Liability Protection: No More "He Said/She Said":

Asserting that the customer (or caller) is always right is the biggest lie in business. Unfortunately, the common practice without call recording has been to side with the customer. Nothing saps motivation more quickly than when the agent knows he or she is in the right, but the boss still takes the caller's side in a dispute.

With call recording, there's no reason for a "he said/she said" dispute to ever arise. If a caller has a complaint, listen to the call. If the caller swears he gave the agent certain information and the agent says otherwise, the recording will show who is right. If the agent made the mistake, side with the caller.

However, if your agent is right, *side with your agent*. Nothing generates motivation and loyalty more than knowing your boss, and by association your organization, stands behind you. Be as polite as possible when you tell the

caller, "I've listened to the call, and I'm sorry, but you did not provide that information in the conversation." If your recording and phone system allow it, play back the call for the customer and let him or her hear it definitively.

In addition to these types of disputes, call recording also provides an outstanding defense against regulatory compliance and malpractice allegations. If an allegation occurs, make certain to review every call associated with the case. If no violation exists, you have more evidence in your favor. If a mistake was made, you have the motivation to settle quickly.

Alarms Provide Alerts for Potential Problem Calls:

We've addressed the human component. Let's talk for a moment about a key, yet simple, technology that can be of important help in workforce optimization: call alarms.

Many recording systems have configurable alarms. Set these up to let you know if there's a problem. Study your call history to find the time parameters for "average" calls. When the call is much longer or shorter than the norm, set up a notification so that you can review it immediately for potential quality issues. On a particularly long call, jump in, monitor it while it's still going on, and coach the agent by instant message.

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April/May 2011

CALL RECORDING

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Part of a Total Solution in the Quest for the Perfect Contact Center:

In and of itself, call recording won't make your medical contact center an Eden of efficiency overnight. This takes planning, people, and processes. In some cases, those processes won't have anything to do with what's said on the phone. But, by training your supervisors and agents when they begin, refreshing that training regularly, consistently reviewing your calls to gather intelligence about how your center operates, resolving disputes fairly, and using technology to alert you to problems in real time, that perfect paradise may be closer than you thought. ☛



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Call Recording and Compliance: IMPORTANT CONSIDERATIONS

Due to the privacy considerations inherent in the healthcare industry, including those mandated under the Health Insurance Portability and Accountability Act (HIPAA), there are a few considerations to keep in mind when dealing with call recordings:

Playback: Just as patients shouldn't be allowed to see PC monitor screens, calls should only be played back in a way that others can't hear it.

Encryption: Calls should be encrypted on the server or in the playback stream to prevent them from being usable in the case of falling into the wrong hands.

Formats: Make sure your solution natively stores in a proprietary format. If you need to provide a recording to another party, convert it into a common format such as .mp3 or .wav before sharing the recording; then delete the converted file from your server.

Sharing: Recording solutions should have a secure, permissions-based method of sharing calls beyond just emailing an .mp3 file; otherwise, it potentially can be forwarded to or intercepted by unauthorized users.

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