



# Call Recording for Customer Retention and Superior Service

An OAISYS White Paper

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## LEVERAGING SUPERIOR SERVICE IN A DOWN ECONOMY

The current state of the economy in the United States and worldwide has delivered a tremendous blow to businesses throughout a wide spectrum of industries. Lowered consumer confidence, tightened credit at the commercial and consumer levels, decreased durable goods orders, increased unemployment rates, and the risk of inflation are all factors contributing to the anxiety and uncertainty felt in today's business environment.

Typically, during such turbulent economic times, the common response is to "ride out the storm" by implementing a cost reduction plan. Despite recommendations against it, many businesses begin slashing marketing expenses during an economic downturn, as opposed to capturing a greater share of their respective market by investing more heavily in marketing activities.

Regardless of the measure businesses choose to enact, two things all businesses should remain focused on if they are to survive, and even prosper, during a softened economy are customer retention and superior service.

This white paper will explore how call recording and voice documentation can have a near immediate impact on the quality of service and rate of customer retention in businesses that conduct any portion of their operations via the telephone.



## TRACER

### THE PROFESSIONAL INTERACTION MANAGEMENT SOLUTION

Tracer is the award-winning call recording technology solution from OAISYS. Any business that regularly communicates with customers, clients, and partners via the phone can proactively manage the risks inherent in these interactions using call recording. Using Tracer, call recordings become a vital part of developing effective compliance, process, and risk management programs. Tracer ensures phone-based interactions are readily available for handling disputes and verifying transactions.

Tracer provides robust call recording capabilities and quality assurance functionality, including:

- Patent-pending OAISYS Portable Voice Document (PVD) technology, providing a secure means of reviewing, sharing, and adding notes to call recordings
- Intuitive user interface with call visualization feature, simplifying call recording review and auditing
- Effortless organization and search capabilities for retrieval of the targeted call recording within seconds
- Integrated live call monitoring providing real-time agent coaching and personnel development
- Customizable employee evaluations and powerful quality reporting so call centers can proactively monitor, manage, and improve workforce performance
- Optional desktop video recording capabilities, enabling a more complete picture of agent activity

The Tracer call center management software integrates with leading business communications systems, and is easily deployed via flexible, cost-effective OAISYS call recording platforms. Additionally, businesses choosing Tracer for their call recording needs also receive our award-winning Talkument™ voice documentation and collaboration software enabling knowledge workers to search, playback, annotate, and share their phone-based interactions.



## TRAINING AGENTS AND KNOWLEDGE WORKERS

Extensive and recurring training is among the most important elements for developing highly competent and satisfied staff, a cornerstone of delivering superior service and ensuring customer satisfaction. Effective training goes far beyond simple orientation and script review.

Rather than the haphazard approach to training that many businesses find themselves taking, successful companies see measurably improved results when they implement regularly scheduled training for their entire phone-based agent and knowledge worker staff.

An example of one such training regimen might be:

- Initial training upon hire
- Follow-up training during first 90 days
- Remedial training following a negative evaluation or customer interaction incident
- Refresher training every 90 days

This type of program lets employees know the company is willing to invest in their performance and assist in their success. Such efforts have been shown in multiple studies to contribute to agent morale and longevity.

In any agent or knowledge worker environment, turnover is traditionally a major cost and performance affecting factor. If an agent leaves or is fired, it requires significant resources to get a new hire up to speed and competent in their knowledge about an organization, its products and processes. Tracer can deliver an immediate positive impact to the training process. Every call center and its agents experience exceptional calls and calls that fall short of expectations. By using the employee's actual conversations and pointing out what was done well, what went wrong, and how to prevent missteps from occurring in the future, managers and supervisors can generate positive performance results far more quickly than by using hypothetical scenarios or role playing. Additionally, the effect on customer retention can be tremendous, as situations that threaten customer satisfaction and loyalty can be identified and corrected.



Another means of incentivizing agents is by sharing examples of particularly successful calls with the entire group. For example: If agent Janet took a call from an irate customer, alleviated the customer's dissatisfaction, and handled it so well she actually managed to generate an additional sale, it would be logical to share that call with the whole staff so they could see how she did it and possibly incorporate that approach into their own interactions. It also serves as a special recognition of Janet's performance and can encourage other agents to strive for excellence so their calls are the next ones to be shared.



## USING TRACER EVALUATIONS TO ACHIEVE CUSTOMER SERVICE EXCELLENCE

Tracer provides managers and supervisors with the ability to evaluate agent and knowledge worker performance based on a number of customizable criteria. Evaluations can be run on as many or as few calls as desired.

This product includes the ability for agents and knowledge workers to self-evaluate their interactions. Employing the same criteria, questions, and scoring systems used by their supervisors, employees can gauge and report on how they felt they performed compared with established company standards.

This provides supervisors with insight on how their employees perceive their own performance, an especially valuable benefit when that perception is dramatically different than their supervisor's assessment. Whether an employee self-evaluation is higher or lower than that of the supervisor, this capability can prove extremely effective in advancing personnel development efforts.

Disparity between the employee's self-evaluation and the supervisor's may be an indication of confusion regarding what they are supposed to be doing and when. If they undervalue their own performance, they may lack confidence or direction. A supervisor informing an employee that their performance is better than indicated in the self-evaluation can be a sign of the need for additional training and a better understanding of company goals.

When employee concerns and performance issues are addressed by reviewing actual calls using consistent criteria, the result is superior, dependable service by all employees, directly benefiting customers, and consequently, the bottom line.



## SUPERIOR SERVICE AND THE CUSTOMER PSYCHE

In the current global social and economic situation, tension at the customer level is significantly increased. While every customer is unique and has their own distinct concerns, what is nearly universal is the fact that each of them is experiencing some degree of stress regarding their personal and organizational financial futures.

**Q.** How can an organization leverage this negative side-effect of a down economy and convert it to a competitive advantage?

**A.** By placing a renewed focus on customer needs and making sure each and every customer enjoys a pleasant experience every time they interact with your organization.

Employees should be trained to instill the understanding that the primary goal is to make each customer's interaction with the company the high point of that customer's day. While it should be the goal of every organization to satisfy the needs of their customers, many organizations fail to recognize just how profoundly a negative interaction can impact their customers. One study has found that a negative experience as a customer can adversely impact short-term health<sup>1</sup>. "When (customer) expectations are not met and a bad customer experience results, it literally makes people sick. More than a quarter of US consumers (29 percent) say that they have gotten a headache, felt their chest tighten, and/or cried after a negative customer experience<sup>2</sup>." Obviously, customers experiencing that kind of encounter are not likely to be customers who return.

Now more than ever, companies and organizations need to ask themselves just how good their customer service really is. When surveyed, only eight percent of customers claim to have a "superior" experience, while 80 percent of companies claim to regularly provide such experience to their customers<sup>3</sup>.

Readily accessible recordings of actual customer interactions can help managers and other leaders see where the true strengths of their customer service and retention efforts really lie, and what can be improved.



## THE VALUE OF RETURNING CUSTOMERS

Difficult economic periods exacerbate price as a driving factor in customer purchasing decisions. As a result, price disparities between any given set of vendors can expect to equalize. The company that sells its item for 10 percent more than its competitor can expect to see the competitor receive a greater share of sales.

When price is not a factor, either because the item for sale is exclusive or because the price is relatively equal regardless of where a customer buys it, service and the customer experience become the next most prominent decision factor.

According to the Peppers and Rogers Group report cited above, 64 percent of companies in the United States claim the customer experience takes a critical role in determining their business strategy. That percentage is up from 38 percent in the 2007 survey.

Companies realize that providing the highest degree of satisfaction possible is a key element to their survival. How will call recording in general and Tracer in particular address that need? The following section will provide specific instances and examples.



## TRACER AND CUSTOMER SATISFACTION

Companies deploying the Tracer call recording solution from OAISYS have a wealth of tools and data at their fingertips to ensure customers are receiving the best possible service and that agents and knowledge workers are performing to expected standards.

Every manager or supervisor should be asking the following about their employees' phone-based interactions:

- Was the caller greeted warmly and with professional enthusiasm?
- Were the caller's questions answered correctly and professionally?
- Did the agent try to turn the conversation into a sale?
- Did the agent explain any promotions that were relevant?
- Did the agent try to upsell the caller?
- Did the agent ask for the order?
- Did the agent thank the caller for doing business with the company and ask if there was any other way they could help the customer?

With Tracer, supervisors can listen to every call from every agent, or any specific call or group of calls they choose to spot check quality assurance. They can easily rate and evaluate agent performance, then use actual calls to show agents where they excel and where room for improvement exists.

Tracer also provides the ability to capture valuable data on customers and their reasons for contacting an organization. With the User-Defined Call Actions functionality in Tracer's OAISYS Recording Client, organizations can program buttons to input and associate information along with their call recordings.

For example: A company could create buttons for, "Sales Order", "Order Status", "Service Issue", "Billing Inquiry", and "Other". Agents and knowledge workers can click on the corresponding button that matches the reason a caller contacted the organization. For "Other", they could also associate a text notation detailing the specific reason for the call.

Supervisors and managers can then run detailed reports on why callers are contacting the organization and tailor their staffing and scripting accordingly. Rather than basing their decisions on assumptions, they can have detailed factual information at their



fingertips.

If a customer calls in with a complaint or other service-related issue that should be elevated to a manager's attention, the ability to input text-based annotations provides further insight into the situation. With Tracer's intuitive user interface, customer calls can be sorted into Microsoft Outlook-style folders for ease of storage, search and sorting, allowing managers and knowledge workers to easily and conveniently locate the exact call they need based on any number of search criteria.



## CONCLUSION

During an economic downturn, it becomes especially critical businesses do their absolute best to retain every customer they have. Customers expect and deserve the best service possible, both in-person and over the phone. If they do not receive the level of service they expect, there is always a competitor waiting in the wings, willing and able to take their business.

Thorough, real-world training of employees is the key means of communicating customer service expectations and providing the necessary tools to meet, and exceed these expectations. A well-trained staff will provide better customer service and enjoy higher morale within the organization, satisfying customers, reducing turnover costs, and driving revenue.

Tracer, the professional interaction management solution from OAISYS, offers affordable, useful, and intuitive functionality to help organizations track the quality of customer experiences, train, motivate, and reward staff, and help expand their customer base while maintaining the customers they already have.

To find out more about Tracer, Talkument, and OAISYS, please contact us at 888.496.9040 or visit us on the web at [www.OAISYS.com](http://www.OAISYS.com).

To find a reseller near you, go to [www.OAISYS.com](http://www.OAISYS.com), click "Support", then "Reseller Locator".

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