

Bridging the gap
People build success

Customer & Employee Engagement Forum

28 April
Brighton
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Professional
Planning Forum

Developing your People to Deliver Excellence

...and drive customer loyalty

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Delivering excellence...

1. What does it mean to customers?
2. Common shortcomings?
3. What behaviours deliver excellence?

Five steps to developing excellence in your people

Recommendation impacts loyalty –
but what impacts recommendation?

Four factors impact 'recommendation'

- Brand relationship
- Experience of / satisfaction with product offerings (features; relevance; pricing)
- Ease of doing business (simplicity; efficiency; reliability)
- Touch point experience (the degree of warmth and understanding conveyed by front-line employees)

Ease of doing business...

- Customer Effort research cited key barriers as:
 - Having to repeatedly contact the company to resolve an issue
 - Having to re-explain an issue
 - Having to switch from web to the phone
 - Expending moderate to high effort to resolve an issue
 - Being transferred

Experiences need to be...



easy

'Promoters' value?

Confident
Clear explanations
Helpful
Personal
Happy
Understood me
Excellent service
Nothing too much trouble
Friendly
Trouble-free
Efficient
Listened
Interested in me
Individual
Seemed to care
Took time for me
Not pushy
Explained it all
Quick
Reassured me
Polite

Experiences need to be...

About Me



What experiences create Promoters?

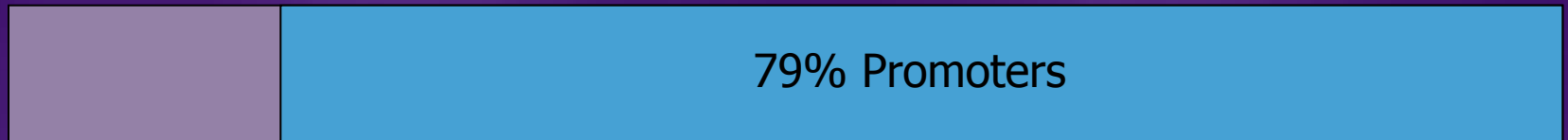
There are Eight Loyalty Building Experiences™
(LBEs) which increase customers'
likelihood to recommend

Loyalty Building Experiences™

- “It was easy to access to someone who will help”
- “Person sounded / appeared positive and eager”
- “Person listened well to what I had to say”
- “I was given enough time and I didn’t feel rushed”
- “I got a chance to ask questions”
- “Person seemed to have a good level of knowledge”
- “Gave me the impression they enjoyed serving me”
- “The interaction was concluded to my complete satisfaction”

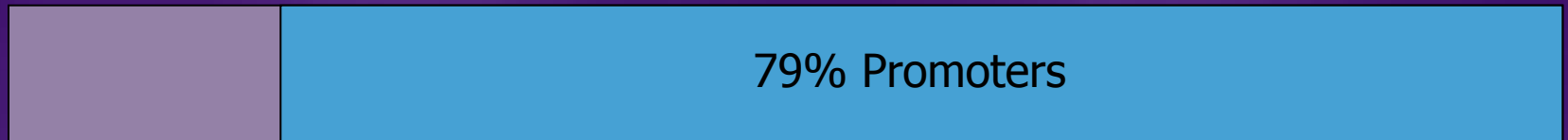
(Ref: Robinson & Etherington: Customer Loyalty, A guide for time travellers)

Impact of behaviour on Promoters

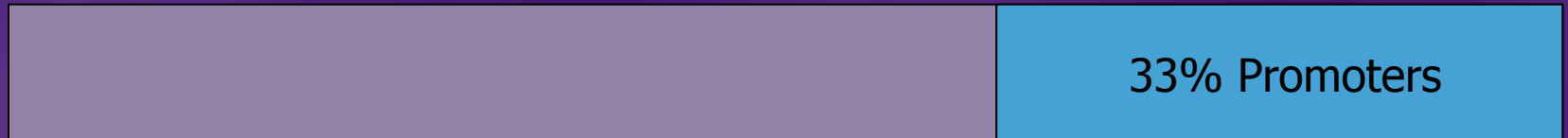


LBEs = Perfect 10's

Impact of behaviour on Promoters

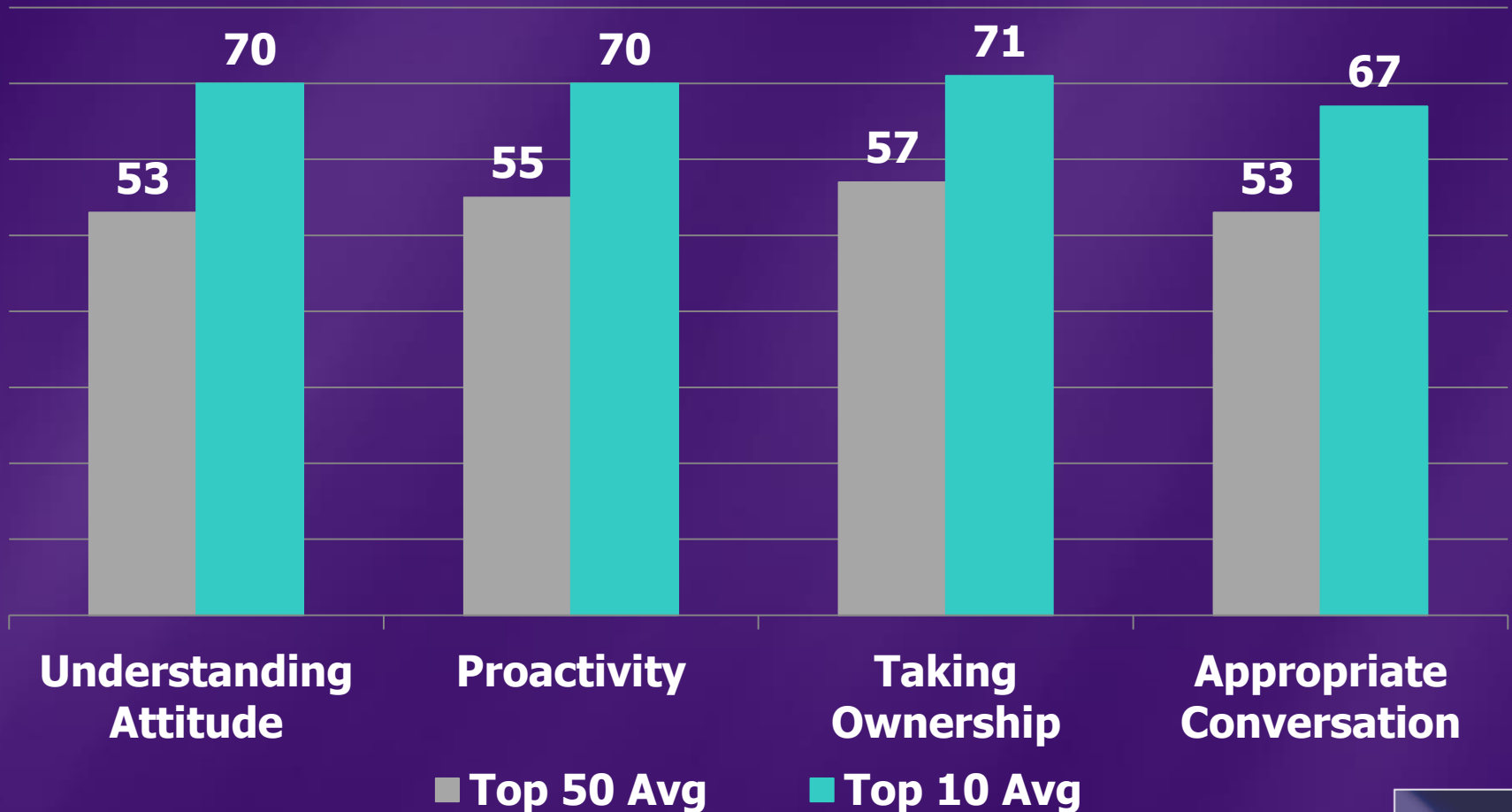


LBEs = Perfect 10's



LBEs = 8/10

Top 10 versus Top 50 – % excellent





VERY!

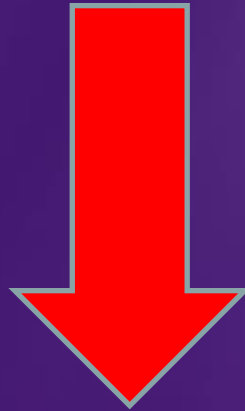
Common shortcomings

Four-stages to a call



VERY common shortcomings

- Agents make assumptions - don't listen – rush to respond
- Agents have too big a share of the 'air time'
- No questioning – or - poor questioning
- Lack of understanding about caller's feelings / issues / motivations



- Poor / no rapport
- No feeling of individualised / personalised – not 'about me'
- Transactional – just got the job done...if you were lucky!

Customer Experience Model

Welcoming

Clearly introduce the company and give your name

Thank the caller for waiting

Sound upbeat and positive

Build rapport at the start of the call

Understanding

Use open questions to fully understand motivation

Use active listening

Adapt questioning style

Play back your understanding

Closing

Confirm next steps and timescales

Ask if there is anything else

Give the caller your details

Say 'thank you!'

Leave the caller feeling positive

Presenting / Solving

Sound confident - use positive language

Offer relevant options

Take ownership

Recap the caller's issue and your proposed solution

When excellence is delivered...
consistently

Characteristics of success...

- Clarity of desired experience
 - aligned to corporate vision / customer promise
- Agents are trained to deliver the desired experience
- First-line managers are trained to assess and coach the desired experience
- Call quality assessment is aligned to the desired experience
- People know that their personal success means delivering the desired experience

What gets measured...

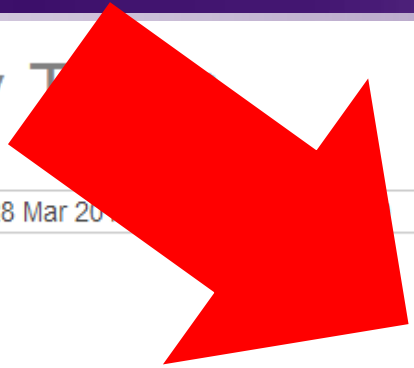
Call quality measurement

- Often calls are monitored for compliance / adherence to process AND quality of experience
 - but compliance / adherence to process are seen as *what really matter*
- Behaviours monitored - frequently
 - too generic
 - haven't been trained / explained
 - aren't coached or aren't coached sufficiently frequently
- Call quality is not as important as other factors
 - *'yes it matters ...but not really if you hit your numbers'*

Areas to focus coaching

Suzy T

Date of call 28 Mar 20



1. Be up for it!

- Research call (out)
- Clear structure for first seven seconds
- Not hesitant or rushed
- Use positive words and phrases
- Tell broker what's in it for them (out)
- Ask if broker has time (out)
- Be 100% focused
- Respond to pace and urgency
- Use or gain knowledge to build rapport
- Show you care

2. What does the customer want?

- Understand the broker's attitude and motivation
- Understand the client's attitude and motivation
- Use appropriate questioning techniques
- Identify underlying needs
- Conversation not interrogation
- Actively listen
- Play back information
- Flag where we can help
- Gain broker agreement throughout (Yeses)

3. Ask for the business confidently

- Be confident when delivering solutions
- Match features and benefits to needs
- Quickly say if we cannot help
- Maintain relationship when declining business
- Look to say 'YES'
- Ask 'would it be helpful, useful, OK, if...?'
- Ask for the business confidently
- Address all concerns
- Address all opportunities
- Avoid dead air


4. Make a personal promise









- Agree specific date and time for your actions
- Agree specific date and time for broker's actions
- Thank the broker for their time and business
- Use a personal closing
- Ask if there is anything else
- Make a personal promise, and keep it
- Use brokers name as appropriate
- Added accurate call note to Magic policy (UST only)

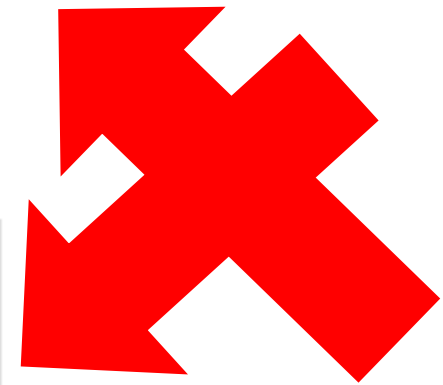
Team performance versus targets

Manchester Home

 68% (Target: 50%)

 View in Excel

				ART
<input type="radio"/> James Brady		9	0	73%
<input type="radio"/> William Rose		10	0	70%
<input type="radio"/> Robbie Spear		10	0	67%
<input type="radio"/> Neil Jolly		10	0	60%
<input type="radio"/> Charlotte Tranmer		8	0	70%
<input checked="" type="radio"/> Brad Johnson		8	0	65%



<input type="radio"/> Face to face
<input checked="" type="radio"/> On the phone (draft)

Start Evaluation

View Current Assessment

Make measures matter!

In conclusion...

Behaviours that deliver excellence...

- Get the basics right – every time for every customer
- Ensure a warm welcome
- Deliver a memorable close

The real differentiators

- Create mutual understanding – questioning and play back
- Treat as an individual – responding; reacting; engaging
- Go the extra mile – be proactive
- Take ownership and keep promises

5 Steps to developing excellence in your people

1. Translate your 'brand' in to.... *'this is what we want you to do every time - for every customer'*
 - create clarity
 - don't be ambiguous - say what excellence looks like
2. Give people the skills to deliver it
3. Train managers to assess it; to give feedback on it; to coach it
4. Align quality measures – make them matter!
5. Spot people doing the right things!

Thank you!

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