Agent Retention and Engagement

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The following are excerpts from a recent webinar with ICMI clients featuring ICMI's founding partner Brad Cleveland and ICMI consultants Wendy Fowler, Josh Streets, and Steve Campbell. In these discussions, they identify current trends and challenges, address key questions, and provide recommendations on agent retention and engagement.
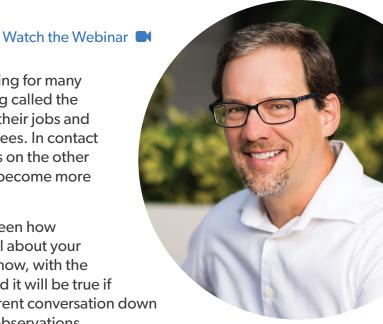
Key Trends

Brad Cleveland

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The last few years have been extraordinarily challenging for many organizations. Many have struggled with what's being called the "great resignation"—referring to employees leaving their jobs and the challenges in hiring and keeping capable employees. In contact centers, this has happened as we've faced challenges on the other end of the equation: our workloads have grown and become more complex.

Research is clear: there's a powerful correlation between how engaged your employees are and how customers feel about your organization and the services it provides. That's true now, with the challenges we're having with keeping employees, and it will be true if unemployment ticks up and we're having a very different conversation down the road. With that in mind, let me summarize three observations.

First, we could see signs of the "great resignation" well before the pandemic.
There are two fundamental trends changing customer service and support. They are the backdrop to the challenges today. One is the nature of the work. With automation and AI getting better all the time, the rote interactions and processes employees have handled in the past are increasingly automated. That leaves our employees with work that is increasingly high value, complex, and sometimes emotionally sensitive. And it involves more channels. So, these aren't cookie-cutter interactions.

The other trend, the other side of the equation, is the workforce handling that work. Millennials are the largest working generation today—53 million in the workforce. Gen Z is an even larger population, and they're just entering the workforce. Research has found that younger generations, especially, need to know their work matters, and they need an environment suited to knowledge work, not a bygone industrial age.

Many knowledge-economy employees say that the lack of agency is *the* major source of dissatisfaction at work—meaning lack of control over decisions, time, and output. Here's the hard reality: many of the employees who leave contact centers say the job isn't a fit.

- "You're told when and how to go in and out of this or that work mode."

- "You're handed schedules that dictate your day down to the minute."

- "Your supervisor's monitor flashes red when you get stuck handling an interaction."

- "Oh, and your schedule changes at any time because the forecast is off."

Employees vote with their feet. They're saying, "This is not who I am; it's not fulfilling and it's not giving me purpose." Now, don't get me wrong, that doesn't describe the best contact centers. And we need to get the right people in place at the right times, have thoughtful schedules, and so forth. But it's all in how we manage these things. When we have a leadership approach that *empowers* instead of controls, it's like night and day.

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Second, a sense of purpose remains *the* key driver of engagement and retention.
Employees need to know they're making a difference. My advice is to routinely ask them a very specific question: Are there requirements in your job that are at odds with doing what's best for customers? These can be rules, procedures, communication, or technology barriers. Look for themes, and then work hard to fix them.

As an example, an employee with an insurance company never heard what happened once she processed claims. It was a downer. She brought that up and the organization began capturing stories from customers who were eager to share how the company helped them get back on their feet after devastating loss. These stories have circulated widely, and they have positively impacted everyone.

Third, now more than ever, it's essential to develop opportunities for learning and growth.
A recent report by ICMI's sister company, Omdia, found that 45% of employees don't feel like they can grow their careers with their current employer. That's almost half, and that recent sample is well into the great reshuffle that's already taken place.

Lack of development opportunities is a serious demotivator, and it's so unnecessary. Building an organization focused on customers requires incredibly diverse skills and knowledge. Think about it—there are new channels, the dynamics of managing an ever-evolving workload, communication, technology, processes, data analytics, and knowledge management—all of the disciplines that are

part of our contact centers. Don't let your best employees get bored! Certainly, don't give them reason to believe they are in a dead-end job. Find ways to develop their skills and expand their responsibilities.

Interestingly, supporting multiple channels is perceived to be a beneficial career move/opportunity. In a recent ICMI survey, 95% of agents think supporting multiple channels boosts their career prospects. This suggests that, as you build for a true omnichannel contact center, it's smart to give agents opportunities to handle a range of channels versus dividing them out by this or that channel.

Some organizations are waiting for the storm—supply chain problems, turnover, etc.—to pass before they give this area the attention it deserves. But it's now that engagement is so important!

Q&A

Wendy Fowler

More insights from Wendy 📹

According to a recent ICMI survey, the percentage of agents reporting that they experience stress all or most of the time climbed from 27% in 2019 to 35% in 2022. And the number one factor they cite is lack of schedule flexibility. Wendy, what are companies doing to provide more flexibility?

It's not surprising to hear the percentage has increased so much because our lives have changed significantly over the last couple of years. Employees are balancing homeschooling children, caring for ailing parents, and running back and forth to the office. It's no doubt that it's more stressful than ever and employees need more flexibility.

> *Other organizations are opening opportunities for volunteering, professional development, and self-paced learning courses around topics such as communication, meditation, and diversity.*

But leading companies are responding. They're rewriting their playbooks to give employees more flexibility. Here are some examples:

- A 5,000-seat contact center stopped scheduling breaks. Instead, they're adding 30-minute buffer to their schedule adherence goals. Employees want to do the right thing—they're not taking their breaks during the busiest times.

- One company is sending a positive message by protecting team and one-on-one meetings. For a lot of organizations, these are the first things that get canceled when things are busy. This organization declared that they're protecting these vital meetings, no matter what.

- Another contact center that saw morale tank when they had their agents return to the office pulled a team of frontline team members together to come up with ideas. They now offer hybrid schedules where half of the center works at home on Mondays and Tuesdays and the other half works at home on Thursdays and Fridays. Everybody is in the office on Wednesdays, where they concentrate on meetings and other in-person events.

- Another organization adopted a shift-bid practice where the top 15% highest performers (based on quality) can custom create their own schedules. The only caveats? The schedule must be 40 hours a week, and they must work a minimum of eight hours on Mondays (their busiest day).

- Other organizations are opening opportunities for volunteering, professional development, and self-paced learning courses around topics such as communication, meditation, and diversity.

The organizations making these kinds of changes are seeing some very positive results!

Josh Streets

More insights from Josh 🎥

Josh, as Wendy summarizes, the theme of flexibility is key to engagement. Are there other overall themes that clients are tapping into to improve results?

Companies that build what I call a "culture of learning" are seeing less impact and attrition and even getting more people in the door. What do I mean by a culture of learning? Here are some of the characteristics we're finding:

- Hire lifelong learners. In many cases, contact centers are just happy with anybody that can come in and fill the seats in the training requirements, assuming they can deliver a good experience. But, if you had the ability to choose those who have demonstrated an interest in learning and growing, why wouldn't you?

There's a myth that you can't run a lean-cost operation and prioritize learning and development. I would like to get rid of that myth.

- Develop a formal, ongoing learning plan. I'm really talking about six to nine months after the initial learning or foundational training has been done. It's more than just on-the-job knowledge and check-ins. It's a deeper level of learning, pre-scheduled by workforce management. It's helpful to have a team maintain an ongoing curriculum and fresh content to keep agents engaged and retained.

- Harness a learning management system (LMS). Your tools must be conducive to virtual environments and different adult learning styles. Our industry is in a place where we can't all do in-person classroom training anymore. We need the right tools to be able to facilitate a strong learning culture. And use them for ongoing learning/knowledge checks, to see who's progressing and where you can provide additional support.

- Build active plans based on employees' career desires, interests, and strengths. Contact centers are often called "incubators" for all the different areas of the business that are going to get that next-level job talent. Some companies will let you try a new role out for a few weeks.

- A culture of learning must begin with senior leaders—and not just frontline leaders, but all the way up to the C-suite. That's important because you must have priority and you've got to have a budget tied to it. We get excited when we see organizations that have reserve funds for learning.

There's a myth that you can't run a lean-cost operation and prioritize learning and development. I would like to get rid of that myth. Learning organizations are very purposeful, and they've got targeted ROI established around it.

Steve Campbell

Wendy and Josh hit on two critical areas—flexibility and a culture of learning. Steve, what else are you seeing and what advice would you add?

I'd like to present three concepts today, starting at a broader level. The first one is that employee engagement is a force multiplier. It's an example of 1+1=3. Studies show a strong correlation between engagement and reduced attrition, higher CSAT, and increased revenue. How cool is that? Raising engagement levels improves attrition, customer satisfaction, and revenue. We should be going all-in on this.

But according to a recent Gallup poll, only 36% of workers were engaged—and among those disengaged, 74% are looking for work. It's imperative that we create a compelling case for them to join our company or stay at our company.

> *One director set up an employee engagement committee. They meet monthly, have a team charter, and always have something in play.*

Second, organizations that are truly focused on engagement have turned this into a keystone habit. Keystone habits are the base level "default" habits. The important thing to note about keystone habits is they have a ripple effect across everything you do. When Paul O'Neill became CEO of Alcoa in the late 1908s, he focused on one thing: safety. Every speech, every initiative, and every investment was all centered on employee safety, and employee well-being. Fast forward 13 years, Alcoa's net income was 500% greater. O'Neill understood that he needed to change the behavior and mindset of the organization. That's the power of keystone habits. And you can do the same thing by placing employee engagement at the center of everything you do. (The Alcoa example is detailed in Charles Duhigg's classic book, *The Power of Habit*.)

Third, anchor your strategy in two things. The first is a voice of the employee (VoE) program. Survey employees regularly, ideally on a quarterly basis. The insights gained from VoE will inform specific engagement activities. Your employees want to see that the company knows what's important to them. The second is sustainability. For example, one director set up an employee engagement committee. They meet monthly, have a team charter, and always have something in play. You can also add engagement metrics and content to your weekly and monthly performance scorecards. This brings it front and center.

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ABOUT THE AUTHOR

Brad Cleveland, founding partner and former CEO of ICMI, is known globally as one of the foremost experts in customer strategy and management. He has worked across 45 states and 60 countries for clients as diverse as American Express, Apple, USAA, the University of California, and the federal governments of the US, Australia, and Canada. Brad is also an author, and his recent titles include *Contact Center Management on Fast Forward* (2019) and *Leading the Customer Experience* (2021). Connect with Brad at www.bradcleveland.com.