



The Pitfalls of Performance Management Systems (PMS) within a Contact Center: Or Why PMS and CRM fail within CC

Today in most contact centers, the upper management is clearly focused on cost and performance in order to maintain revenue margins within a very competitive market place. More often this includes *performance management systems* (PMS), as a key indicator of a center's success in driving effectiveness. These systems connect to PBX's, email servers and text chat to count the number of contacts an agent receives within a working day. In more advanced systems, we tie in customer satisfaction results and other agent KPI's such as first time resolve rate, time to resolve, quality monitoring score, and CRM accuracy, etc. In addition, in even more advanced systems, the management team can log feedback sessions with agents, set customized goals for agents/supervisors and management teams. All of which are great, and essential in providing a standardized performance-rating tool, but fall short as a complete management system.

In understanding the complexity of performance management and its limits or pit falls, we need to ask ourselves a simple question; What is the root cause of poor agent performance and how are we correcting these behaviors? As a tool, PMS can help us identify the results, but does not answer the question. In other words, the tool is only as good as the management system surrounding the tool.

Part 1: Correcting System Shortfalls:

As management, we need to look at the center's processes to identify the root cause of performance issues. This may start with the recruiting of agents and a focus on success profiling (please refer to Success Profiling white paper for more information), to ensure your organization has the right person in the right position. Next look at the new hire and enhancement training programs to see if your organization has a complete feedback improvement model. These processes are key in ensuring performance improvement within the organization. They should include agent performance gap analysis, the development of effective integration of coaching and feedback programs. In addition, is the training effectiveness tied into daily performance results and tracked within the PMS tool? To ensure that the same agents do not repeat training and the training is relevant, I suggest that the team nominate a high performer in the area of question to be part of building the training material, and whenever possible, help in the delivery of the training. Resolving hiring/training challenges, while ensuring that the organization has a robust improvement management system, will solve a large portion of the performance management shortfalls.



Part 2: Correcting System Shortfalls:

We also need to look at the integration of performance feedback processes and how organizations perform. This involves the organization to take a close look at current and new process management. Most organizations rely on yearly reviews and do not update reviews processes to match the new tools. The best practice would incorporate a weekly review process with each agent, along with a daily performance management review by the agents within an automated web-based system. In order to meet the new demand of resource management, the organization needs to build tools and processes that meet the new demand. This is achieved by incorporating new management styles and feedback processes, which utilize automated procedures and manual processes. This may mean that the organization must take a closer look at how each supervisor's time is utilized. These styles would bring more time to the supervisor with respect to coaching and ultimate feedback with training teams. Also, the team needs to look at how to evaluate performance. Do we judge newly hired agents at the same level as established agents? Instead, do we look at an evaluation, which looks at the average learning curve? Most agents are able to achieve common KPI's within 6 to 8 weeks although; you will need to build your ramping schedule, which is designed around your products and current agent performance.

Part 3: Correcting System Shortfalls:

Now that you have reviewed and revamped your hiring, training and agent/training feedback processes, we will need to look at the next step of refinement. We will need to recap how we can improve a PMS implementation with not only process improvement, but system understanding by management. The training of management on how and why PMS works is as important as implementation of the tool, as they will need to buy into the new program. This goes back to the old saying "build it and they will come", which was the down fall of CRM systems in the 80's. Avoiding this and other downfalls, while implementing a PMS, should be the focus of the management team. Thus, the close look at the operational processes along, with key performance indicators, will be an integral to your PMS implementation.

Remember, most PMS fail due to lack of understanding with how the system will work once fully implemented.

Once we have a comprehensive hiring, training, quality feedback/coaching, as well as, a management commitment to programs and processes established, we start seeing performance results improve and become more stable from week to week and quarter to quarter.

This does work in the right hands...

