CONVOSO

Build a Winning Team of Productive Outbound Call Center Agents

Your Guide for Maximizing Agent Efficiency

Introduction

Who You Are

- Involved in the operation of a contact center for outbound sales, lead generation, lead buying, and/or lead selling, lead transfers

- Probably an Owner, Manager, Director, Admin, or Supervisor (or agents with career aspirations!)

- A small business, multi-location call center, or enterprise-class contact center either virtual or in-office

What You'll Learn From This Ebook

Think of this as a resource guide for tackling agent performance and productivity issues. Get tips and tools for creating and managing a top-notch team of agents, whether remote or office-based. Our knowledge is pulled from our work with hundreds of call center owners and operators over a period of many years.

Ultimately, building a winning team of productive outbound call center agents requires driving efficiencies for not only agents, but in conjunction with efficiencies for leads and managers. That's when you see the ROI take off.

Why You're Here

You're handling daily issues that drag on agent effectiveness and profitability. Here are some common issues around agent efficiency.

- Cost and inconvenience of onboarding and training time

- Low retention rate resulting in excessive time spent with recruiting and training new agents

- Agent downtime (paying for wait time)

- Labor costs not adequately compensated by revenue

- Slow lead response, reducing time and speed to contact

- Low morale, high turnover, burnout

- Frustration with bad leads, time spent spinning wheels

- Increasing compliance regulations raising risks of fines and litigation for call centers, and lowering contact rates

- Agent inefficiency (multiple manual steps for wrap-up time, dispo time, tedious repetitive tasks)

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Reality Check on Turnover and Burnout

All of those daily issues level up to one of the central issues call center managers face: turnover.

Turnover for US contact centers averages 30-40%[1] and is double that of other occupations, according to The Quality Assurance & Training Connection. Larger contact centers have shown the highest rates of turnover. About half of the agents who leave are either entry-level or intermediate-level.

That reads very much like "burnout."

If you're a call center manager, you may be thinking that burnout just comes with the territory, that high turnover is inherent in the lead gen industry. While it may happen, there are tools and strategies that help boost morale, reduce turnover, and increase agent performance. You'll find tips and tools throughout this ebook.

Here are some of the cited root causes of call center burnout. What's good to know is that many of these are preventable.

The Root Causes of Burnout

- Non-challenging or repetitive work
- Lack of recognition
- No career growth or development opportunities
- Inflexible working environment
- Employee disengagement
- Excessive pressure or stress
- Abusive calls
- Low job satisfaction

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To Build a Winning Team of Productive Outbound Call Center Agents, Focus on Quality in These Four Areas

| Hiring & Training	Leads & Dialing Strategies	Tools & Data Analytics	Management & Motivation

Here's a Preview of More Ways to Improve Agent Efficiency That We'll Discuss in This Ebook

- Bringing in the **right talent** in the first place
- Giving them the **onboarding**, **training**, and **ongoing coaching** they need to succeed
- Using **automation** to streamline tasks and save agents headaches and time
- Boosting efficiency for managers and leads by **tracking the right KPIs** in real time
- Establishing expectations and accountability for **agent performance**
- **Motivating** agents for success with incentives and compensation
- Offering agents **communication** tools and **opportunities** to feel part of a team/community

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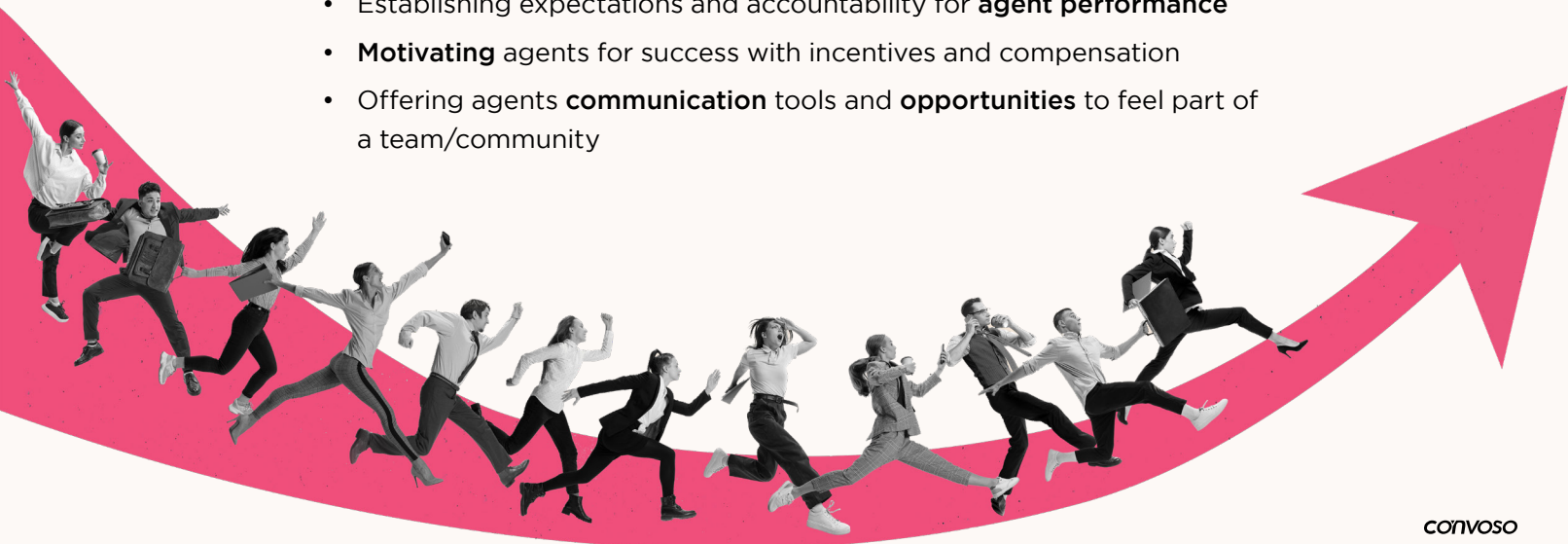
I think the agent's job is really difficult.
They're making hundreds of calls, they're getting hung up on, people are saying they're not interested.

It takes a special human being to do that job and I don't care who you are, get on the phone, you do it, and you see how hard it is.

So to me, to improve agent efficiency it really becomes about how can you **streamline** their experience and make it **as simple as possible** given the amount of repetitive words that they have to do to go from one call to the next.

Nima Hakimi
CEO and Co-Founder, Convoso

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Hiring the Right Candidates

You can have an amazing dialer, awesome data, and outstanding analytics. But if you don't hire the right folks with the right qualities to meet the demands of your call center — to succeed at the job of an agent at your company — new hires won't make it and you'll hear that sucking sound as your ROI goes down the drain.

You'll be continuously spinning the wheel of turnover, watching your labor costs take a bigger bite out of your bottom line. You'll have frustrated managers who spend too much time recruiting and training, which gives them less time to support your team of producers.
So then your best agents are unhappy.

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Finding the Best Candidates = Meeting Your Goals

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To find the right people for your call center's future, start by taking a look at the best people you have right now. Identify the qualities of your top performers. Think about who fits best into the team and why. Come up with a bullet list of personality traits, areas of competency, and work habits that describe your ideal candidate.

By clarifying the specific qualities of your most productive agents, you can communicate these in your recruiting efforts for both job posts and interviews. Finding the right person for the work that's actually done on a day-to-day basis at your company means your new hire is more likely to learn quickly, perform well, fit in with the team, and succeed.

Finding Agents with the Right Experience

You're probably hoping to find someone who has telemarketing experience on their resume. They've proven they can sit in the seat, stay on calls, and succeed.

Finding someone with specific experience in your industry would be an asset as well. Whether that's insurance, solar, mortgages, credit repair, or another industry, a candidate with built-in knowledge will save you time and money in training, and give them a leg up when they get on the phone for your call center.

You Can't Train Confidence and Initiative

While related experience is great, it's not everything. One of Convoso's call center operators describes confidence and initiative as some of the most important qualities he looks for in a potential agent and watches out for during the trial training period. If a job candidate seems willing and enthusiastic to learn, has other ways of conveying initiative (perhaps from other jobs), and shows confidence in speaking on the phone, they are more likely to succeed.

With a big payroll and pressure to create results as fast as possible to hit your numbers, you may be hesitant to hire entry level candidates. But sometimes a candidate with no call center experience who shows confidence and initiative may, in the end, be a better fit than one who lists it on their resume.

At-home Agents

If you're running a virtual call center, it's recommended that you choose agents who have demonstrated the ability to be motivated, to be self-sufficient, and to produce consistent results while unsupervised. That's a level of training you probably don't want to get into—to be the testing ground for their first experience of working from home.

Beyond the Resume

What other qualities are essential to you for someone to be successful in your operation? Consider:

- How well do they follow directions?
- Are they punctual?
- Are they curious?
- Do they ask questions beyond "what do I get paid?" and "when are my days off?"
- Can they tell stories about how they have:
    » Worked on a team?
    » Worked independently?
    » Hit goals?
    » Overcame a challenge?
    » Responded to an angry call?

In their article "Key Skills for Call Center Agents: How to Hire and Train the Best," Digital Market Media identifies several important points:

- Encourage Premier Communication Skills
- Identify Knowledge Retention
- Inspire Emotional Intelligence
- Nurture Organization Skills
- Reward Attention to Detail

Learn more ➡

The Worst Interview in the World

From the hard-won experience of Michael Velardi, former SVP at Resource Marketing Corporation:

"In the past, I've been a really bad interviewer, where I'd say, 'This is our job. I'm really excited to have you come in. This is all we do. This is what our company does. This is what the position's about… Do you have any questions? No? Wonderful. You start on Monday.'

Michael Velardi
SVP, Resource Marketing Corporation

"That's the worst interview in the world, because I did all the talking. If you do all the talking, you'll end up with bad candidates.

"Just put three to five open-ended questions out there, allow each candidate to answer, and see where the conversation goes. Use the questions as a litmus test. If you ask the questions and you don't get the response you want, it's, 'Hey, thanks a lot for coming in.' If you don't do that, you'll sit in interviews for hours."

Nobody has time for this stuff, especially if in the end, you can't hire the candidate because they're not the right person."

The S.O.A.R Interviewing Method

S.O.A.R. is an established, effective interviewing method with a behavior-based format that helps the interviewer better understand actual responses to real situations. Carefully outline questions targeting situations or obstacles that will elicit information you want to know about the core competencies of your job candidate.

1. **Situation**

   Briefly contextualizing a real life situation that you experienced in your previous employment.

2. **Obstacles**

   Define the problems you encountered while chasing a goal/target.

3. **Actions**

   Identify specific actions you took to overcome those obstacles/opportunities.

4. **Results**

   Share quantifiable and qualitative outcomes of your decisions and actions.

The S.O.A.R. method enhances the interview processes by allowing candidates to share real life experience, rather than just hypothetical (what would you do if…). Incorporate your company's values into the questions. If teamwork is a core value, then ask about experience they have working in teams, problems encountered, actions taken, solutions found, and what they achieved.

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Launch Pad

Onboarding and Ongoing Training

Once you've hired the right agents, time and care spent onboarding, training, and supporting them lays a foundation for success that will pay off with greater productivity and reduced turnover. Imagine a team of happy, high-performing agents.

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Onboarding

Start with the success of your newly hired call center agent in mind. Review your process or startup program for bringing them into the team and preparing them for the job.

Consider the functional support you need to keep your agent motivated, improving performance, and committed to contributing to your company as part of their own career advancement.

⑦ What's your compensation structure?

⑦ What are the procedures when calls escalate and they begin to feel out of their depth?

⑦ What's the communication hierarchy and resources for getting support?

⑦ What's a clear path for how they can progress in their career? What does advancement look like in your company?

- **Onboard agents in the company culture, too.** Motivate new agents and get them to buy into your vision with training about your culture, goals, and more. Set expectations about will happen not just in their first days and weeks but in the months and years beyond.

- **Arrange introductions** with anyone the agent may need to seek out for support. Make time to introduce them, even briefly, to be welcomed by the team.

- **Consider partnering** your new agent with a mentor, an experienced agent on your team who can answer questions, guide and encourage them.

- Management should plan to **check in with the new hire regularly** and find ways to build rapport.

To Set New Agents up for Success Your Program Should Answer These Questions

⑦ What specific goals is this agent set up to achieve? How are these goals connected to your company's objectives?

⑦ How can you encourage confidence about starting and knowing they have the support to succeed?

⑦ How can you make them feel connected to the team?

⑦ What training programs are available as they continue?

⑦ What are the incentives to achieve?

More Onboarding Tips…

- **Develop a consistent onboarding program** that helps the new hire integrate quickly. Make a checklist of people to meet, points to discuss, equipment/tech set up, start up training roadmap, paperwork to be completed.

Workspace Setup

Have a system that ensures all needed equipment and tools, passwords and access are ready to go by your new agent's first day. Make sure someone from tech support is available to address any issues getting them up and running, and that the new hire knows who to call if additional tech issues arise.

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> Setting **expectations** and establishing a sense of **camaraderie** early on can make a difference in how new-hires perform in their jobs days, months and even years later... Managers want to set clear parameters for **attendance**, **schedule adherence**, **quality of work**, and other policies, as well as being very clear about what happens when employees don't meet those expectations.

John Loughlin
VP Business Development Federal Sales, Senture, LLC

Training & Coaching

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You've hired a new agent, or agents, because you need to get them working on the dialer as soon as possible. You've got KPIs to deliver on and the quicker they start calling, the closer you are to achieving your goals.

So, perhaps at this point you're ready to stamp this with "rush" and fast-track your new hire's training – they seem pretty smart, they'll get it. From your perspective, the system may be self-explanatory. They've got the call script so just put them on a live call and watch their metrics. Right?

Pause right there and keep the following in mind.

Training Agents that Last

If you want to lower turnover and increase retention, invest in agent development. To nurture productive agents who thrive you have to create a training methodology that works for your industry and your call center's operations. And then back that up with continuous support and coaching.

Your training process needs to strike a balance between not putting the agents on the phone before they're ready and not spending too much time over-teaching and over-reviewing material in preparation. Their ultimate job is calling. So, in many ways you do want to get them on live calls ASAP.

Train Agents in More Than Just Your Product

Sales consultant Jason Cutter sees a common mistake across many call center's onboarding and training programs: they only focus on one thing.

"So many companies focus on product training. They hire people, they throw them into their training, and they just say, 'Here's what we do, here's what we sell, now go sell it.'"

The problem with this approach is that they're missing two important steps:

1. **Onboarding agents into a company culture:** Making agents feel part of something bigger than the products they're selling is crucial to driving performance, encouraging retention, and building a workplace culture that can adapt to change. Sharing your core values, your mission, and your vision should be a big focus of your onboarding process.

2. **Teaching and improving essential soft skills:** Companies overly focused on products don't help people deal with people. Make sure training deals with actual sales and service, with persuasion, with handling difficult customers and much more. "Don't just assume that people will already know that or figure that part out," says Cutter.

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Getting New Hires on the Phone

This is where the rubber meets the road, the agent's moment of truth.

A new hire really doesn't show their true potential until they're on the phone, handling live calls with real leads.

Set them up for success with a guided dynamic agent script, which will also cut down on training time, because it simplifies the flow of the call and makes it harder to go off track. That said, the agent still needs support.

Be there to coach them using the "Listen and Whisper" feature of your dialer. Talk with them about what worked and where they need improvement. Support agents with an acknowledgement that it takes time to get up to speed.
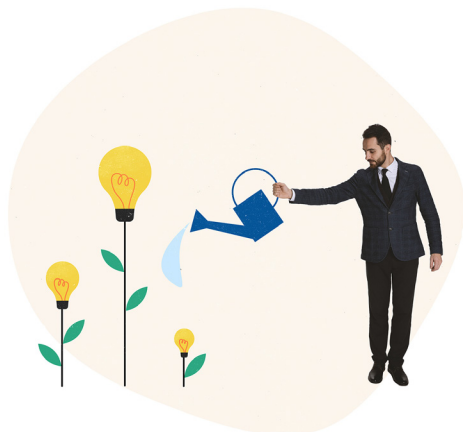
This is a critical part of evaluating whether your new agent is really going to be a productive member of your team. Or not. The sooner you can tell, the better. Managers and supervisors can find themselves in the situation of being continually distracted by an agent who just isn't getting it. It'll be your judgement call as to whether that time is worthwhile, because you're investing in a high potential producer.

Balance Emotional Response

While you're listening to and evaluating new agent live conversations and watching their performance in metric reports, also consider the possible emotional response that the agent experiences when you're trying to train.

As Mike Velardi describes, "It's a dual phase. I have a lesson I want to teach you. But you have emotions you're going through. So I can't simply say, 'Hurry up, I want to get the lesson taught,' because you might have felt like you were on the spot, or lost money, or did something where all of a sudden now we have to go back and focus on certain parts of the training."

You don't want a demoralized agent. That raises the chances they may quit. Encourage agents frequently with positive feedback.

"Having the right team, with the right leader that can articulate that vision and get people to buy into that, I think that's huge. Because once you do that, your team members are ready to run through brick walls for you. They're ready to do whatever it takes to help you hit your goals."

David Stodolak
President, Solar Direct Marketing

Don't Waste Your Time

Avoid time wasters. Or identify them quickly. These are the folks who don't really want to be there. Sure, they'll interview, have credentials, and train, but in the end, will fail to produce. Sometimes, this becomes most evident when they have to get on the phone, and whether they're able to adapt to the flow of calls, to the repetitive nature of the work…for hours.

When Calls Go off the Rails

Communicate a clear plan for what happens when a call escalates so the agent knows who they should reach out to for help if they're unsure of how to handle the call. With coaching and clear procedures, these calls become lessons rather than notches of failure or disappointment.

Go Beyond the "One and Done" Approach

A lot of call centers place a huge emphasis on initial training, and then fail to continue providing coaching once they get new agents up and running on the phones. Jason Cutter thinks this fails agents—and ultimately their call centers—by providing too much training and then not enough.

This approach makes agents "drink from a firehose," and then assumes they're going to remember anything (let alone everything) from that crash course when they're on the phones.

"All of it's going to go out the window, especially when it's under 'live fire,'" says Cutter. "You can practice all you want, but once the bullets really start flying, every one's going to go on instinct. And your agents really don't have enough instinct because you haven't taught them enough yet."

Deliver "Continuous, Continuing" Education

For this reason, continuing education is crucial. Or, as Cutter puts it: "You've got to give your agents continuous continuing education. You have to take what you've training them on and give it to them again in nuggets over the course of several months."

To help with this ongoing process, Cutter says there are a number of platforms out there that can streamline learning delivery—platforms that can gamify learning, as well as deliver micro-learning modules and daily lessons over text.

"Remember, learning is a long game. You don't want turnover, you want long-term. That's how you get better: when your team is there long-term."

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You can be selling some kind of lower-end insurance product—it doesn't matter. Everyone has to **feel a part of something**. Because when they feel part of something, as things change, they're okay with change. If you have a change-resistant workforce it's because they literally don't know why they're there.

Jason Cutter
Sales Consultant, Author, Speaker

Guiding Agent Phone Manner and Vocal Delivery

Listen

Careful listening by the agent will help determine the direction of the call. Agents can learn information from the prospect that will help them know how to respond and where to go in the script.

By listening, agents can learn about prospect pain points, what they want most, what they need, what they're worried about, what they've tried before that didn't work and why.

Tone Tips

Give your agents these useful tips on vocal delivery pulled from our blog post Cold Calling Scripts That Get Results.

- Have an upbeat vibe. The ol' "smile as you dial" is worthy advice.

- Use conversational, natural speech.

- Minimize filler words (um, uh, you know, like, er...) that express a lack of certainty or confidence in what you're saying.

- Convey personality and care.

- Listen for the customer's tone and mirror that to some degree. Being in sync can make a difference on how agent's connect with the prospect.

- Speak confidently. Call center managers can support agent confidence by ensuring adequate training on the product or service, and by providing a reliable, well-thought-out cold calling script with automated dynamic scripting.

- A little self reflection: Express genuine interest and sincerity, and avoid getting pushy and acting out of self-interest ("I need to make this sale!"). You'll get more positive results.

- Humanize the prospect. Use pictures of fictional leads to help visualize being in conversation with a real person while on the call. Is this awkward? Maybe. Will it help create better conversational flow with the disembodied voice on the other end of the line? Definitely.
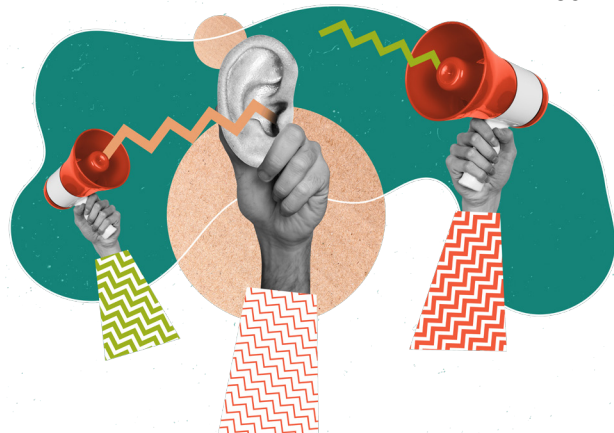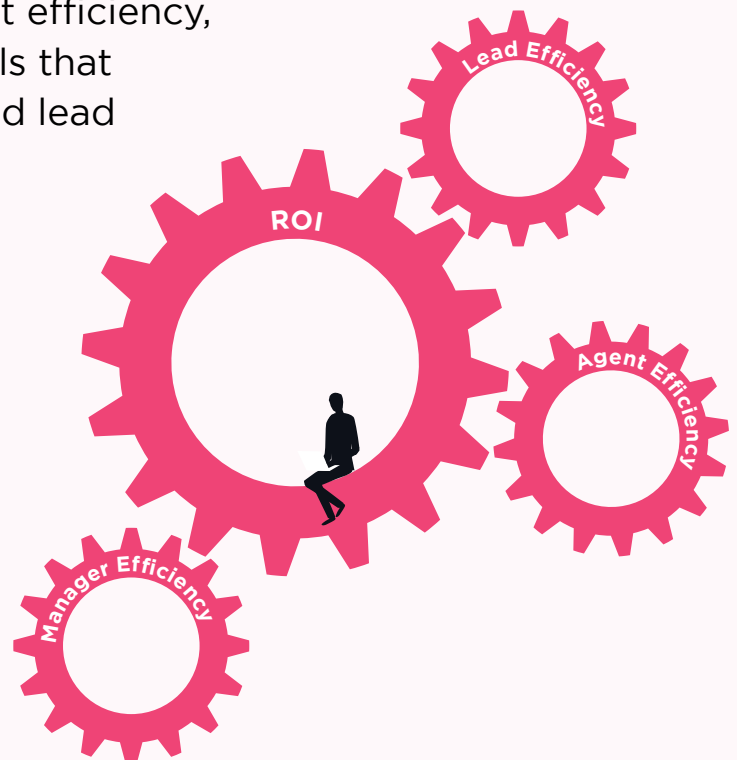
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Improve Agent Performance

with Tools that Drive Efficiencies for Agents, Managers, and Leads

To achieve the best improvements in agent efficiency, we really need to look at lead efficiency and manager efficiency as well. They're interconnected. We'll start with agent efficiency, then move on to tools that improve manager and lead efficiencies.

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You have to find ways that you can **automate**. When you add up those seconds amongst hundreds of calls, you start seeing a big difference.

If the agent's experience is smooth, then the consumer's experience is smoother, and they have a better experience across the board. The agent **converts more**.

You've really got to get them in a flow where they're able to go through as many conversations as possible, and then hopefully their commission and their earnings go up, and as a result their **morale goes up** and **turnover goes down**.

Nima Hakimi
CEO and Co-Founder, Convoso

Improving Agent Efficiency with the Right Tools

Automate agent workflows with software that can maneuver sophisticated and effective processes to route your leads, such as moving them to different campaigns and automatically launching an action. That way, agents can focus on converting leads instead of wrestling with your software system.

Tools to Streamline Agent Time

Tools that automate repetitive tasks build agent momentum. With fewer interruptions, agents stay motivated by maintaining a rhythm over their day. When efficiency goes up, so does morale.

› QUICK DISPOSITION

Decrease agent wrap-up time so they can move on to the next call with 1 to 2 clicks instead of 3 to 4 clicks.

Quick disposition streamlines calls by simplifying the process. Codes enable agents to efficiently capture relevant information and record details about contact history.

For example, agents at an insurance lead-gen call center selling live transfers used to spend 1 hour of their day wrapping up calls. Using Convoso's quick disposition feature the call center decreased wrap up time to 20 minutes. That's 40 minutes more available talk time per day (a 60% increase). With 60 agents, the team gained an additional 40 hours of available talk time. That's the equivalent of 5 full-time employees.

› DYNAMIC SCRIPTING

What if you could prompt your agents to say the right thing at the right time? With dynamic scripting, you can.

Dynamic scripting prepares your agents to interact with each specific lead by auto populating customized dynamic fields within the script, such as their first name. Based on the lead's reaction, dynamic scripting prompts agents to a new set of instructions or a different script loaded with CRM data.

Build a script with common objections and rebuttals, then automatically personalize fields with the


○ × 60 ● = = 40 hrs

lead's information pre-built into the script. The agent is guided in a conversational flow including questions to ask and custom fields to fill in to collect information.

Because the road map of the call is somewhat established in the guided script, you can ramp up new hires faster. The call center manager can use it as a training tool for the agent to learn how to pitch, reducing the amount of in-person coaching by the manager.

› STATE- OR SKILL-BASED ROUTING

Automatically route leads to agents according to state, language, demographics, or whatever criteria you set up.

State-based routing connects calls originating from specific states to agents licensed in those states. (Critical to industries requiring state licensing of agents, such as insurance and real estate.) Calls can also be personalized call scripts adapted for different geographic locations.
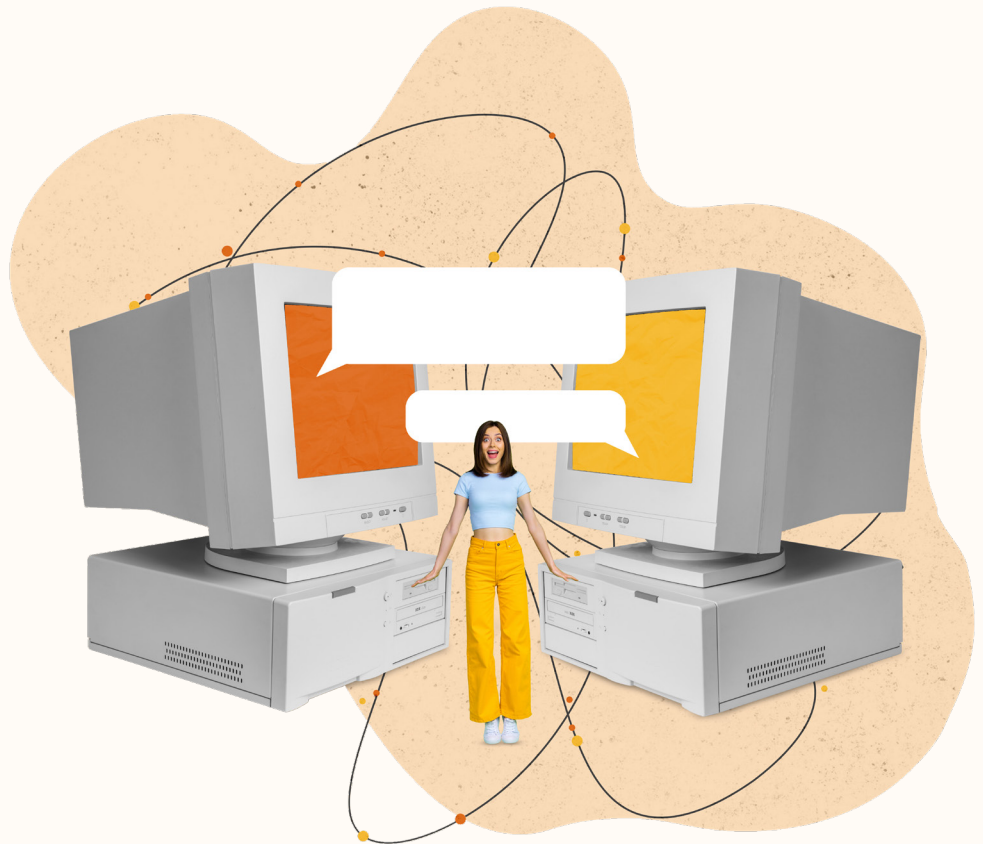
› SMART INBOUND ROUTING

Make sure inbound calls go to the same agent that made the initial outbound call attempt. This prevents an agent from losing a potential commission.

› CUSTOMIZABLE AGENT DASHBOARD

Improve agent experience with easy-to-use streamlined dashboards with customizable colors and layouts.

Tools to Communicate With Agents

› LISTEN & WHISPER

Listen to agent conversations on live calls. When necessary, admins can whisper guidance to help close the sale, and even jump in on conversations if needed.

› BROADCAST INSTANT MESSAGING

Communicate updates to individual agents or the entire team. This tool can be especially helpful to motivate the team of at-home agents and create a positive virtual culture.

› BREAK TIME REQUEST

Increase productivity with greater accountability by managing agent breaks. Admins need the ability to approve or deny break time requests from agents. Auto-approval of certain times (e.g., frequency and duration of breaks) can be preset.

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Several **different states** have **different dialing laws** that you either can't call or have to give certain disclosures on. So having the ability to pop in the **right script** and know that in Arizona, for example, you have to give a five digit code after you say your name, that's really important.

Heather Griffin
Solar Call Center Expert

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Improving Manager Efficiency with the Right Tools

Running a call center can be very chaotic because you're hiring and firing agents, training, coaching, and tracking metrics. Sometimes the smallest change, or lack of change, can cost thousands of dollars; for example, if a list is being called that isn't converting or agents aren't being productive. You need to act quickly. But you also need the right tools to understand what kind of action needs to be taken.

Here are some top tools to help drive manager efficiency:

Tools to Manage Accountability and Performance

› CUSTOMIZABLE DASHBOARDS

Pull in the key metrics you're tracking and consolidate your reporting needs to save time. Dashboards provide call center managers with access to customized real-time data at a glance. When you can track and compare the success of individual agents, lists, and campaigns, you will make better decisions that drive productivity for your agents and call center.

› AGENT MONITOR

Your agent monitor should display vital campaign information, including dial level, drop rating, number of dialable leads, total number of agents currently logged in, and more. You should be able to monitor every agent's status and listen to their live calls.

Tools to Manage Agent Productivity

› AGENT PRODUCTIVITY LOGS

Keep tabs on agent login and logout time stamps, as well as their availability status with reason codes. Think of the agent log as a timeclock.

› AUTO LOGOUT

Admins can use logic rules to auto logout agents if they're on a dead call for too long or spending too much time on a pause code, e.g., lunch. Reports can be run on auto logouts and pause codes.

› WRAP-UP TIME LIMIT

Set the amount of time agents are permitted following a call (wrap-up time) before they are timed out with a forced pause and an automatic popup message you've set.

› BREAK TIME REQUEST

Increase productivity with greater accountability by managing agent breaks. Admins need the ability to approve or deny break time requests from agents. Auto-approval of certain times (eg, frequency and duration of breaks) can be preset.

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Improving Lead Efficiency with the Right Tools

⟩ LIST MANAGEMENT

Set your dialer system to automatically recycle/redial through leads. If you have to manually reset a list of leads each time it has finished calling through them, that becomes inefficient, and you may be racking up agent idle time if you're not at your desk to do the reset. Set rules to automatically move leads from one list to another. For example, set up a hot, warm, and cold campaign depending on the age of the lead or disposition.

⟩ TRUE PREDICTIVE DIALING MODE

A predictive dialer uses advanced algorithms to predict the ratio of people who will pick up the phone and initiates enough outbound calls to connect all available agents with an active call based on the expected rate.

With a true "predictive mode" you can set it and forget it, and it will automatically adjust the dialing speed to make more or fewer calls in so that agents stay productive on live calls.

The alternative is wasting manager time. Without a true predictive dialing mode, you have to constantly watch the dialer throughout the day to increase or decrease the number of calls (or lines) going out, and to monitor whether agents are waiting too long between calls (which can happen depending on the time of day or if they're dialing through a bad batch of leads).

You want your agents to connect with leads, so you look for effective ways to increase your contact rate. Dialing strategy plays a key role. That's why efficiency with your leads is critical for making an impact on your agents' productivity.

⟩ PRIORITIZING THE RIGHT METRICS

Before you implement dialing strategies, you need to take a comprehensive, big picture look at your list and lead performance and understand your true cost per acquisition (CPA)—which is different from your cost per lead (CPL).

Use real-time analytics to get insights at the list and list vendor level. Then you'll make smarter decisions that will impact agent productivity, and you can:

- Stop wasting agent effort on low performing lists
- Increase efforts on higher performing lists
- Redirect budgets to vendors offering the higher performing lists

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It's all about agent happiness. If you are setting up your dialer correctly, and their contact rates are through the roof and they're getting to talk to more people per day and make more sales, they're going to be stoked. The bottom line is you're going to want to **optimize your dialing strategy**. Not only for cost, but for agent efficiency.

Kyle Andersson
Call Center and Lead Generation Expert

Tools to Manage Data Efficiency

› OMNICHANNEL AUTOMATION

Consumers don't pick up on calls as much as they used to. Your predictive dialer should be able to automate a sequence of text messages, emails, and voicemail drops into your outreach strategy and stop the sequence once contact has been made.

› LEAD RECYCLE/REDIAL LOGIC

Configure your dialer to customize a redial attempt schedule with different gaps in time between redial attempts and based on the outcome of the call. For example, a new lead comes in and gets called instantly, and if there is no answer, you can set a schedule to try again in 10 minutes, then again in 1 hour, then again in 3 hours, etc. Also set custom schedules per disposition.

› CALLER ID REPUTATION MANAGEMENT

Currently one of the biggest challenges call centers face is getting their caller IDs flagged as spam or scam. Too many companies don't know when or which of their caller IDs get flagged and as a result, they run into a pair of compounding issues:

- Calling with flagged numbers, they struggle to make contact with their leads and limit conversion opportunities.
- They constantly need to buy new caller IDs—and even then some of those are already flagged.

What today's teams need is comprehensive caller ID reputation management—along with a dialer designed to handle today's environment.

With a caller ID management solution like Convoso's ClearCallerID™, you can see which of your numbers have been marked as spam and by which major carrier. Plus, as a managed service, we'll handle the registration of new DIDs and the remediation of flagged numbers to help ensure you're calling with as many healthy numbers as possible and maximizing your contact rates.

You should also make sure your dialer gives you the ability to limit how many calls get placed per caller ID and implement more

strategic, less predictable outreach patterns. By reaching out less often, across more channels, and at the optimal times, you can improve contact rates further while avoiding spam labels in the first place.

› ANSWERING MACHINE DETECTION

Agents burn out when voicemail doesn't get detected because it wastes their time. Their not having conversations, they're converting-leads. Make sure your call center software provides accurate and fast answering machine detection.

› USE TIER-1 TELCO CARRIERS TO IMPROVE CONNECTION RATE

Low quality carriers won't always complete all calls. By using Tier-1 telco carriers, you know a call will be completed if it is a valid number. With a higher connection rate, your agents have an increased chance of reaching a lead.

Outbound Calling Strategies: Accelerating Lead Efficiency

Learn how improving lead efficiency will dramatically improve profitability.

Read the article ➔

Artificial Intelligence:
The Virtual AI Agent

—

No discussion of efficiency and productivity is complete without a discussion of AI. With the advent of ChatGPT and other generative AI tools, many are wondering how AI can enhance and supplement the work done by teams of call center agents. Here's what we're already seeing.

"As AI becomes more intelligent and more efficient, it's going to be able to answer questions faster than a human would. Unlike a human, an intelligent virtual agent (IVA) has access to unlimited data, and it's going to be faster, more accurate, and more consistent in the support it delivers for consumers."

Bobby Hakimi
Chief Product Officer and Co-Founder, Convoso

› COMPREHENSIVE QA

QA is effective at improving sales, but many call centers have long struggled to actually monitor most of their conversations, let alone all of them. AI changes all that, with tools from the likes of Balto and Observe. ai providing real-time monitoring and analysis of agent performance.

Agents can receive guidance in real time, managers can monitor—and be automatically alerted to—emerging trends in team performance, and call centers can gain a new level of visibility into and control over their operations with AI-driven quality assurance.

› LEAD SCORING

AI isn't just helping teams focus on the right aspects of coaching. It's also helping teams focus on more of the right leads. Integrating AI-powered lead scoring and segmentation can eliminate time-consuming review processes and help managers target their outreach to the warmest, most valuable leads in their pipeline.

› FLUENT TEXT AND
VOICE CAPABILITIES

Conversational AI is revolutionizing the ability of leads and customers to converse with machines over voice and text. With the ability to hold fluent, life-like conversations over the phone and in text messages, IVAs like Convoso's Voso.ai are unlocking new levels of efficiency for teams at call centers and beyond.

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"
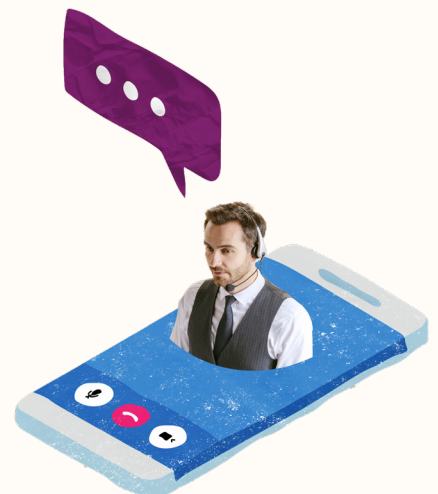
AI, in terms of quality control, is really going to play a huge role for better conversations, more **compliant conversations**, and ultimately, increased results in the agent performance.

Nima Hakimi
CEO and Co-Founder, Convoso

Here's What Voso.ai Can Do for Your Call Center

——

Voso.ai is a conversational AI-powered intelligent virtual agent that understands the intent of your conversations and responds fluently over voice and SMS, powering more conversations, more revenue, and a lower cost per acquisition.

1. AUTOMATE ROUTINE TASKS

Eliminate tedious, time-consuming tasks for your agents and reduce your CPA by letting Voso.ai handle repetitive conversations, schedule appointments, and more.

2. GENERATE MORE CONVERSATIONS

Improve response rates, drive more call backs, and reach out to more of your leads over SMS.

3. PRE-QUALIFY AND TRANSFER HIGH-QUALITY LEADS

Save your human agents for the most valuable calls and let our intelligent AI agent pre-qualify leads and transfer them to the right closing agent.

4. ACCELERATE YOUR SALES CYCLE

Engage leads in the channel of their choice, respond to inquiries 24/7, and drive efficiency through your entire sales and lead generation pipeline with the power of conversational AI.

5. EMPOWER YOUR AGENTS

Improve motivation, strengthen skills, and lower churn as agents stay focused on rewarding tasks—like talking to customers and closing more sales.

VOSO.ai

Conversational AI that drives more sales

Learn more

4

Establishing Expectations

and Accountability with KPIs

Here we dive into the metrics you can use to set a foundation of expectations and to hold agents accountable. You can't manage or improve what you don't measure.

Understanding agent productivity starts with objective metrics that are tracked hour to hour and over time. These numbers show who your top producers are, who may need more training/coaching, and when someone may just be having an off day (unless it's the data, which is why we track list metrics simultaneously).

You need to watch for trends and patterns in the data throughout the day so you know if agents are fundamentally meeting expectations and whether action needs to be taken in terms of agent efficiency or perhaps lead efficiency.

Primary KPIs for tracking agent efficiency include:

- Talk Time
- Wrap-up Time
- Pause or Wait Time
- Calls per Agent
- First Call Close
- Number of Sales
- Revenue per Agent

"

Dialing platforms—the good ones—can tip you off to agents who are beyond a certain amount of time (on breaks, wrap-up time, etc.)…and sometimes they can **automatically log them out**. Make sure you're speaking to your dialer manager about what those are. Talking about this every day is really, really important to **drive utilization** as high as you can get it.

Rob Bayer
President, Anomaly Squared

5 Call Center Agent Performance Metrics You Need to Monitor

Zeroing in on the right metrics can make it easier to monitor agent performance, and identify potential issues and coaching opportunities as they unfold throughout the day. Use these five agent-centric KPIs to check in on the performance of your team members.

1. AGENT SALES

When you look at your agent sales metrics, are you only seeing sales by your top agents or are you seeing a healthy mix? Are agents meeting sales expectations?

2. AGENT CALL TIME

Measure your agents' pause, wait, and wrap up time to determine pace. Measure efficiency by tracking call length. Look for patterns to see what's working on a campaign, productivity of your agents, and performance of the lists.

3. AGENT WRAP-UP / DISPOSITION TIME

You need to monitor those seconds it takes to end a call and the time in between calls because they reduce an agent's overall dials and performance.

4. AGENT PAUSE TIME

Track pause time to look for patterns that might identify a higher than normal break trend.

5. AGENT NUMBER OF CALLS TAKEN

Is your agent focused? Track the number of calls agents make in relation to their average and your expectations based on team averages.

See All of Your KPIs in One Place

Top Agent KPIs to Track

Every call center manager has their own ideal KPIs. With a customizable dashboard, you can see them all in one place and in real time. This capability is essential to keeping your call center humming along smoothly.

Use your dashboard to monitor agent performance throughout the day and balance adjustments between your agent metrics and tweaking your dialer configurations accordingly.

Favorite KPIs shared with us by the director of a successful lead generation call center.

- Call to transfer rate
- Billable calls per hour
- Call to billable call conversion rate
- Avg connected duration (Transfer)
- Avg talk time (Pre-transfer)
- Avg wrap-up time (Post-transfer)
- Billable time vs Non-billable time

Agent Utilization - A Deeper Look at Pause and Disposition

Outbound call center expert Heather Griffin offers this perspective.

"Disposition and pause time reporting. This is a standard report that's incredibly imperative and I don't see it happen at every call center. Basically shows what your employee utilization is. It's the percentage of time you're paying an employee that they're on a workable status.

So if your agent is on pause and dispo 40% of the day, and they're on talk time, say, 20% of the day, it'll look like a pie chart and show you what they're doing with their time. A good employee utilization is 80% or above, and that means they're either waiting for a call or they're talking on a call, and that's 20% of the time they're not doing either of those two things."

Drive Productivity by Improving KPIs

At a minimum, your dialer should provide these reporting capabilities to help you improve management of efficiencies for your agents, leads, and dialer.

> AGENT PRODUCTIVITY REPORT

Get a breakdown of agent time within the dialer, broken into total time, billable time, login time, not ready/ready time.

> AGENT CALLS REPORT

Are your agents experiencing too much down time? This report tracks your agents' talk time, pause time, and wrap-up time. Separates total calls into outbound, inbound, and manual callbacks. Adjusts workflows accordingly to increase productivity.

> AGENT PERFORMANCE REPORTING

How many of your agent's calls are converting to sales? What's the conversion rate on a list? This is a standard report that tracks agent calling activity, showing the number of calls taken, number of sales, conversions, such as percentage of sales to data, etc.

> LEAD REPORTS

View lead info at a glance, filtered by status, campaign, list, and user. Shows if leads are stuck in a list, if they're converting (or not), and helps calculate CPA.

> CONTACT RATE REPORTS

An effective campaign begins with reaching your leads. Quickly see how many of your calls are making contact and how many are missing the target.

> CUSTOM REPORTS

Create your own reports to include the KPIs most important to your call center. Filter reports and drill down based on a variety of variables, from call type to dispositions.

> SCHEDULED REPORTS

Running reports manually wastes valuable time. Increase efficiency by scheduling reports to be run and emailed automatically at a specific time — hourly, daily or weekly.

Know Your True CPA, Revenue, & Profit

Agent performance is connected, positively or negatively, to the performance of your data. This is why you should be tracking KPIs impacting your leads and lists.

With a List Conversion Report, you'll track the cost of your payroll (agent's time on calls), cost of your leads, and cost of your dialer. The report shows you, in real-time, your total cost to generate a conversion (CPA), how much revenue and profit (ROI) was generated per list and per agent, broken down by lead source.

Customize your report to find out:

- Number of leads dialed
- Number of leads that actually got on the phone
- Contact rate
- Number of sales
- Transfer rate
- And more, filtered for any time period you want, emailed to you directly by the hour or for whatever time you set

The Importance of Snapshot Reports

Monitoring a number of metrics with snapshot hourly reports can be critical for quick decisions in a daily call center operation, whether that's closing a list, adjusting the dial level, or suggesting an agent take a break.

Regularly review your KPIs for historical insights about performance over time. When you take a long view on your call center's performance, you can identify trends and anomalies within your data. While hourly snapshots can help you make day-to-day, on-the-fly tactical decisions, looking at data from longer periods of time is essential to fine-tuning, or even overhauling, your team's big-picture strategy, or better understanding an agent's performance—especially if there are changes.

To Sum Up

To drive productivity and ROI, strategic decisions must be made using the right KPIs and the right combination of data to create greater efficiencies for your leads, lists, agents and management.

Your contact center software provider should be able help guide you to the metrics and reports that will be most valuable to your goals. Should you need it, your provider's customer success team should also help guide you to understand the context to the data so that you can make the most effective and responsive decisions

16 Essential KPIs for Lead Gen Call Center Profitability.

When you're monitoring agent performance, be sure you're consistently tracking the right KPIs. You can learn about KPIs tracked by some of our most successful customers in this blog post

Learn more ➡

"

A **List Conversion Report** will show you who you're talking to and if it's working. I can see if a list is burnt because our contact rates are super low. I can see a list that's converting. And more importantly, I can turn off lists where we talked to a lot of people and it didn't result in sales.

Heather Griffin
Solar Call Center Expert

5

Compensation and Incentives

Constructive performance-based feedback, encouragement by leaders, generous acknowledgement in front of the team, recognition of high performers. These are standard good management practices for nurturing confidence, motivation, and inclusion.

Successful call center managers and supervisors keep agents motivated day to day by creating a positive, energetic environment that often includes incentives, fun challenges or games, and competitions.

As you get to know the agents on your team, you'll discover how they are individually motivated.

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The Competitive Edge and Incentive-based Rewards

Many people in sales thrive in a competitive environment. Displaying a leaderboard that shows their ranking amongst the group will spur them to strive harder. High performing agents often appreciate the public acknowledgement.

Fuel Motivation with Milestone Bonuses

Mary Grothe, CEO of Sales BQ suggests in a LinkedIn article that top sales performers are fueled by competition and that a fun bonus structure will feed their competitive nature. She offers 5 milestone bonuses for motivating sales:

1. **FAST START BONUS**
   As an example, offer a bonus to agents who accomplish 50% of their 4-month sales goal in the first six weeks. Adjust to your own goal structure.

2. **TOP REVENUE PRODUCER BONUS**
   Offer a monthly payout to whoever is the top producer.

3. **SPIFFS**
   These bonuses help "grow revenue on a specific line or product in a short period of time." Spiffs encourage active agent participation and engagement. Read more about what Spiffs are, how to run an effective spiff program, and potential issues to solve.

4. **SALES CONTEST BONUS**
   Get creative. Sales reps love to compete. Who can convert the most leads before 2pm? Have one sales team in your call center compete with another team.

5. **SALES ACTIVITY BONUS**
   Create a bonus structure for achieving objectives on a weekly, monthly, or quarterly basis. Even a small cash bonus can inspire a healthy competitive sales environment.

Incentive Compensation

Beyond bonuses, incentive compensation is the key to unlocking motivation and high performance. Compensation plans should offer incentive rewards targeting behaviors where you're seeking improvement, based not only on productivity metrics, but also QA and utilization scores.

Sharing important metrics is a tremendous motivational tool. Be clear up front about how they're going to be evaluated - and then follow through on that.

Career Progression

A career progression program lays the path to retention. Make sure your call center agents know specifically what the steps are to progress in their jobs. This gives them incentive to focus on achieving their goals.

"

In my **career progression programs**, it's very clear. For example, if you're here for six months and you meet these expectations, you're eligible for a lead training program. And that gives people hope, and it helps with **retention**.

Heather Griffin
Solar Call Center Expert

6

Communication Strategies

to Promote Agent Productivity

Effective communication is the lifeline to agent productivity, especially as more call centers operate remotely.

Establishing good communication is key to sustaining agent engagement and motivation. Help them understand your expectations, their goals, metrics for tracking performance, and how their contributions fit within the organization. Make sure they know the communication is two-way and where they should go for support.

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Recommended Communication Practices

> BRIEF DAILY COMPANY AND/OR TEAM MEETING

Communicate essential company updates, events, goals, and shoutouts.

> INSTANT MESSAGING

Instant messaging is your go-to tool for individual and small group communication throughout the day. Broadcast chat helps leadership distribute quick messages to the team—this is particularly useful for remote operations.

> ONE-ON-ONE MEETINGS

One-on-one meetings give supervisors and employees the opportunity to communicate clearly about goals and historical performance, as well as career growth and progression.

> EMAIL

Email is best for high-level communication, especially as a follow-up to your daily team meeting. When agents are dialing, they're typically not checking their email—nor do you want them to.

Engagement and Connection

Regular direct communication is essential to keeping agents engaged. Leaders who find ways to nurture relationships and build rapport will be quicker to identify developing issues. While you must, must, must look at the story the metrics are telling you, if you're connected to your agents, you may be able to proactively find ways to resolve a growing disengagement, e.g., Talk to them.

> EMPOWERING CONFIDENCE

Empowered agents are motivated agents. Sometimes low confidence is less about the person (they didn't walk in with it), and more about how leadership has failed to empower them in some way.

According to Dr. Chip R. Bell, public speaker and authority on customer loyalty and innovative service, there are at least five barriers to employee empowerment:

1. **No Purpose** – Employees need to be connected to a greater purpose, to understand how they are part of the whole. This gives what they do context and value. Think of it as giving an employee a cathedral-building purpose, not just a bricklaying task.

2. **No Proficiency** – Establish a training program that enhances competence with product knowledge, strategies, long-range goals, competitor info.

3. **No Permission** – Leaders should provide trust-building guidance, not obedience-driven orders. Balance flexibility in your structure.

4. **No Protection** – Employee mistakes should be regarded as opportunities for growth, not rebuke.

5. **No Payoff** – Do employees experience affirmation when they take responsible risks?

Disengagement

There's a cost to call center turnover. Managers should keep an eye out for signs of disengagement when there's an issue of employee retention.

What disengaged behavior may look like:

- Absenteeism (e.g., frequent, unpaid time-off)
- Lack of interpersonal or professional engagement with peers and managers
- Low productivity
- Disinterest in improvement or goals

Your Agents' Engagement and Morale Matters—for Them and Your Call Center's Performance

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"

Acquisition costs matter, but I think agent morale and agent preparedness is every bit as important as that...It really doesn't take long to figure out that if you're **talking to more people consistently**, your agents are **better prepared** to take a transfer, and in a **better mood** to sell. As a result, your acquisition cost goes way down.

Matt Bowers
VP of Operations, Dynamic Insurance Services

(7)

Trends in the Modern Workforce

Virtual Call Centers with At-Home Agents

The term "call center" generally brings to mind a huge room with computer appointed desks staffed by agents donning headsets.

However, the model of remote agents working from home (WFH) for a "virtual" call center had already been on the rise for years prior to the onset of the 2020 pandemic. That's when the trend turned into a necessity for many businesses. And call centers making the transition found that, for the most part, they were well-suited for remote operations.

Businesses are continuing to discover the win-win for agents and leaders of the virtual call center model. Remote workers tend to be happier and less stressed, which drives up engagement and morale—and can add up to lower turnover and a stronger ROI.

It's no wonder remote call center work is here to stay.

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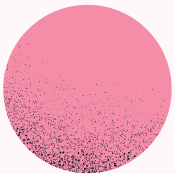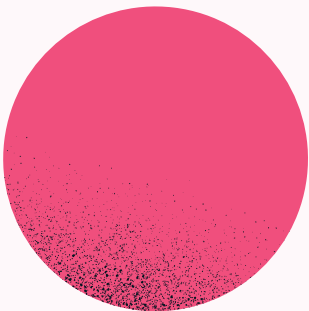
I always thought (a remote workforce) is where we were going. We had been building technology around this for a long time... because this is **how millennials and Gen Z want to work**—a little bit more flexibility and time freedom... So now that we're seeing how effectively it can be done, I think it's going to change the landscape.

Heather Griffin
Solar Call Center Expert

Why Go Remote? The Answer is in the Data...

—

At least 27%[2] of the American workforce now works remotely at least part-time. According to a survey, up to 98%[3] of remote workers say they would like to continue doing so, at least some of the time, for the rest of their careers. It's no wonder when 71%[4] of remote and hybrid workers report being able to better balance work and their personal lives.

But employees' work-life balance and flexibility isn't the only benefit remote work offers. The move toward virtual and hybrid models is also impacting productivity. 65%[5] of remote workers say they're more productive while working from home, while another 25% say they're equally productive.

Advantages of Virtual Call Center Operations

The virtual call center model delivers the flexibility that most of today's workforce demands. But it can also support a leaner, more agile operation capable of greater ROI. Beyond the effects on workers, transitioning to a virtual call center operation can unlock:

- **Lower office space costs:** Without the need for physical space and the costs that come with maintaining it, a virtual model can save businesses as much as $10,600[6] per worker

- **Larger pool of talent:** Unrestricted by geography, businesses can increase their competitiveness by hiring from an expanded talent pool. They can also potentially save on labor costs without sacrificing talent by hiring from different regions.

- **Appeal to Gen Z and Millennials:** Many younger workers from generations that will soon make up the majority of the workforce want the option to work remotely. Virtual call centers can deliver on this demand.

- **Easy to scale:** With less overhead and fewer geographic restrictions, virtual call centers are better positioned to scale quickly.

The Key to the Virtual Model: The Right Cloud-Based Dialer

While the potential benefits of going remote are clear, they can't be achieved without the right tools.

A cloud-based dialing solution offers call centers connectivity and agility, without the need to worry about cumbersome installation and updates required by downloadable software or hardware. Agents can be up on the phones in almost no time at all.

And as we've explored throughout this ebook, the right dialer software can also serve as the engine that drives your call center's productivity and growth, helping you optimize effective strategies and maximize your agent's efficiency—and building a winning outbound call center team.

Interested in learning more about virtual call center productivity?

Read our guide to Managing a Profitable and Compliant Virtual Call Center.

Download ➔

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> ❝
>
> Call centers can easily convert to remote operations with **web-based software**...In reality, most agents could be ready to work at home tomorrow with as little as a Chromebook, a headset, and a stable internet connection.

Nima Hakimi
CEO and Co-Founder, Convoso

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Matt Bowers, VP, Operations, Dynamic Insurance Service

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