

## UpSource Implements VPI EMPOWER: Achieves Double-Digit Increases in FCR and CSAT in Just Six Months

UpSource, Inc. is a premier provider of outsourced sales, support and technology services with locations in New Bedford, Massachusetts; Seminole, Oklahoma; and Nova Scotia, Canada. Combining state-of-the-art technology with an exceptional workforce, UpSource offers a complete range of outsourced customer care services, ranging from comprehensive, turnkey customer care to special services integrated with existing call centers. UpSource can handle up to 100% of your customer communications via voice, email, fax, and web chat channels. Their total outsourced solutions can include back-office account processing, dispute resolutions, loyalty calling, and sophisticated escalations.

### Challenge

- Boost in First Contact Issue Resolution and Customer Satisfaction Scores
- Improved efficiency in reporting and information sharing.

### Solution Overview

Unified Quality and Performance Management with VPI EMPOWER Suite:

- 450 channels of Avaya Aura telephony recording via TSAPI integration
- Quality Assurance with integrated E-learning and Messaging.
- VPI Fact Finder for enhanced customer interaction and business data capture
- Performance Management module for consolidated real-time and historical reporting with integrated Coaching

### Significant Benefits Gained

- Double-digit percentage improvements in both First Contact Issue Resolution (10 % increase) and Customer Satisfaction (12 % increase)
- 8% increase in agent knowledge from a customers' perspective
- Increased management efficiency
- Improved employee satisfaction and accountability
- Improved customer loyalty and

### Challenge

UpSource and its client made a joint resolution to increase its focus on keeping up with the demands of the rapidly evolving and highly competitive wireless telecommunications market that is the primary source of its revenues. Due to the very competitive nature of this market, UpSource needed to closely monitor and drive improvements in first issue resolution rates and customer satisfaction scores. Re-committed to excellence in execution, UpSource and its clients' managers looked for ways to achieve increased accountability for their agents. They needed to find a smarter way to accurately collect and quantify the results of their agent team performance. While supervisors and QA analysts at many contact centers in their industry still delay performing call monitoring and evaluation until the end of the month, UpSource understood that QA data can become outdated rather quickly. *"When you wait that long to monitor calls, you have little to no actionable data to work with – you don't know what's going on throughout the month until it's too late to do anything about it,"* explains Michelle Steinmeyer, Vice President of Operations at UpSource.

UpSource and its client also understood that they needed to maximize the benefit of the information it collected – by improved efficiency and speed of reporting and sharing. For example, when a rate plan was discontinued or a phone model was out of stock, notification to agents and supervisors needed to be sent quickly. While email would do the job of delivering these updates, it doesn't really provide for any good method for tracking of who actually reads them and when.

### Solution

UpSource and their client set out to restructure their contact center processes, technologies and people for better efficiency and to more closely align with the company's service and sales strategy. The company selected VPI EMPOWER suite of contact center workforce optimization software solutions for optimization of performance reporting and close monitoring and improvement of customer satisfaction. This technology was paired with newly designed processes aimed at changing employee behaviors. Changes included:

### Shifting Supervisor Focus to Targeted QA and Coaching

Compliance-focused QA evaluations of random calls were enhanced with deliberate monitoring of Customer Satisfaction data and trends, now performed predominantly by QA analysts. VPI tools helped with automated selection of most coachable calls for evaluation, identified based on expanded business data collected via VPI Fact Finder and tagged to appropriate customer interaction recordings.

The new process freed supervisors to use their time and expertise for analysis of QA and CSAT data and trends and for driving improved performance by Coaching to underlying behaviors. Agents benefit from personalized weekly performance reviews and timely coaching. Outlying performers receive extra attention. *"All interactions that receive a low CSAT score (below 70 percent) or contain specific customer complaints must be evaluated by the supervisor. Agents must listen to those calls, and a timely Coaching session must take place,"* says Michelle. *"Our QA evaluation*

forms now include 'Auto-fail' questions – if either of these compliance-related questions score as a 'fail,' those calls are automatically assigned to the appropriate supervisor for review, evaluation and Coaching.”

### Timelier QA Evaluations and Feedback

Instead of leaving a bulk of call monitoring for the end of the month, all QA Analysts and Supervisors are now required to complete a quarter (22-25 percent) of total required evaluations every week. VPI tools helped with the selection of the right number and type of recordings for evaluation and delivered them into evaluator “to-do” lists with rating forms already attached and ready. This has resulted in the collection of much more actionable and useful QA data – VPI real-time tools are used to deliver personalized information on results of QA to Agents and Supervisors as soon as this data is collected.

### Peer-to-Peer Mentoring

UpSource implemented a highly effective coaching process that leverages the skills and experience of high performers to help low performers; the mentors benefit from validation of their abilities and the respect of the peers, while also helping to provide less effective or experienced agents with the Coaching that they need and desire.

### Quality and Performance-based Shift Bids as Incentives

Monetary bonuses were not driving performance as desired. UpSource used their new technologies to implement a more effective motivator - agents place a much higher value on choosing their own schedules than upon financial regards. Now, agents are much more motivated to work harder and smarter in order to have their choice of hours and shifts.

### Agent and Supervisor Empowerment with Real-time Agent Desktop Tickers and Scorecards

UpSource used VPI tools to customize their real-time, always-on desktop tickers and personalized scorecards. These handy tools are among Michelle’s favorites: *“they keep everyone in the loop and enable every employee at every level within the contact center to work towards common goals. They know how their achievements measure up to targets and team performance at all times and are accountable for meeting their quality goals and performance metrics on a weekly basis, as opposed to the end of the month.”* UpSource agents are measured on a balanced scorecard of metrics including QA scores, CSAT scores, Adherence, Handle Time, AUX Usage and ACW not associated with a call.

Stats	Wireless - Svc Lvl	Tech - Svc Lvl	Sales - ABA%	Wireless - ABA%	Mobile - ABA%	Support Mgrs - Svc Lvl
Michelle Steinneyer	84.14%	85.71%	6.25%	1.91%	7.14%	72.66%

Director real-time desktop tickers display department Service Levels and Abandon Rates.

Queue	Tech Queue	Tech SVL	Wireless Queue	Wireless SVL	LD Queue	LD SVL	HD Queue	HD # Avail Agents	Sales Queue	Sales ABA%
Oldest	0	87.79%	0	86.31%	0	82.58%	0	3	0	5.48%
	0:00:00		0:00:00		0:00:00		0:00:00		0:00:00	

Supervisor real-time desktop tickers deliver critical team Queue, Service Level and Split Skill metrics.

### Automated Desktop E-Coaching and Reminders

Since conditions change so rapidly in the Wireless technology business served by UpSource, a new VPI Coaching and Messaging system was implemented to more easily and consistently send information and PDF bulletins out to agents. The management system tracks whether the agents have read the document and for how long they had it open. It gives supervisors a valuable tool to ensure accountability and to coach agents to peak performance.

Agents are now promptly notified about the results of their QA evaluation, especially when their shortcomings relate to top goals. One such goal is encouraging customers to use eSolutions. UpSource data shows that the customers who use self-service tools are less likely to jump ship to a competitor. When a customer calls in about their usage or their bill, agents are required to always offer to train customers on the use of eSolutions, with simple instructions on how to check usage online or short code it on their phone. Anytime an agent scores a 'No' on the QA question related to offering eSolutions, they are automatically delivered a pop-up reminder message that says *“Please remember to offer eSolutions – you just scored a 0 on your QA form.”*

UpSource	Stats	AUX-1-Personal	AUX-2-Training	AUX-3-Lunch	AUX-4-Meeting	AUX-5-Break	AUX-6-Outbound	Staff Time	Unassociated ACW
	Occupancy: 8%	0:02:39	0:00:00	0:00:00	0:00:00	0:14:42	0:00:00	3:30:15	-
		1.28%	0.00%	0.00%	0.00%	8.56%	0.00%		
[3:12:17 PM] Please remember to offer e-solutions. You have just scored a 0 for not offering e-solutions on your QA Evaluation. OK									

Agent desktop ticker with automated reminder message which must be acknowledged by the agent.

### Benefits and Outstanding Results

In just six months, UpSource team has earned double-digit percentage improvements in both First Contact Issue Resolution (10 percent increase) and Customer Satisfaction (12 percent increase). Agent knowledge – from the customers' perspective – also increased by an astounding 8 percent during the same period of time. *“These improvements dramatically enhanced UpSource’s customer loyalty and competitive differentiation in the marketplace,”* concludes Michelle Steinmeyer.

