

Coach: Powering up performance

See how cohesive leadership, powerful customer insight and a re-orientation of coaching to focus on great conversations combine to deliver large scale corporate transformation.

Summary

COACH, an integrated, powerful insight & coaching tool, is supporting operational implementation of a new customer strategy that is driving change across BT Consumer. With NPS rising, £3.4m saved in engineer costs and 400 fewer customers experiencing delays each week, results are fuelled by a coaching approach focussed on behaviours and customer priorities. Intelligent and targeted customer data puts focus on very specific issues and aligns them with customer or commercial drivers. This has changed people's feelings about coaching, giving more autonomy for personal learning and continuous improvement. All these factors combine to create a strategic customer roadmap that is driving better customer focus, greater efficiency & process improvement. What's more employee satisfaction scores are rising significantly.

Key initiatives

Cohesive leadership drives corporate transformation

United behind a common purpose to be number one for customer service by 2020, the senior leadership team is breaking down silos and delivering large scale change, across all BT Consumer operations. They focus on changing behaviours, including their own, and transforming customer experience through coaching. Jointly-agreed objectives contain commitments for personal changes in behaviour. Fortnightly culture meetings hold each other accountable. They share best practice, challenge and support each other. Significantly, in-house teams, outsourced and offshored partners are all following the same approach as they strive to deliver the right outcomes for customers. "The leader IS the change" "We are coaching our leadership team to change" "We train the leaders first".

Insight at the heart of customer experience

COACH gathers data from diverse sources (customer & process) to identify and automatically present managers with the highest priorities for coaching. It also provides key supporting information, including a call recording. Developed out of a request to free up team managers' time for coaching, Reporting & Analysis created a comprehensive, carefully structured data solution. Coaching priorities are based on customer effort, process fails and complaints; they can be switched dynamically to respond to customer or commercial priorities. Often distressed customers need intervention and give opportunity for learning. What's more, ideas for process improvements ('elevations') can be sent to the teams who can fix them and critical interventions escalated automatically. "It highlights the customer most in need of our attention" "The best tool I've seen in 20 years at BT".

Making data accessible and intuitive

COACH brings different insight together in one place for front line managers and advisors. The Performance Hub is the 'rear-view mirror' on performance. The Medallia NPS dashboard provides near real time NPS scores and verbatim comments (critical for coaching). All of these, including complaints, are visible to team managers and advisors through simple dashboards. Furthermore,



"COACH is the lynchpin, without it I couldn't deliver the vision ... to drive behavioural change. COACH really nailed it."

Julie Etheridge,
Director of Service

"There's a real structure to coaching now. Sorting bad calls out makes me feel great. Previously it was very random."

Angie Seymour,
Advisor

"I do fewer escalations because I understand the customer problems now – coaching has given me different ideas on how to deal with calls."

Helen Scotney,
Advisor

"They are simple tools. No-one disputes the data, everyone focusses on the customer."

Maurice Roche,
General Manager Compliance and R&A



Results

- NPS up 12 pts in 3 months
- c400 fewer customers per week experiencing delays
- c£3.4m saved in wasted engineer costs
- c900 fewer incorrect dispatches per week
- 800 fewer Back Office contact in one week
- £400k benefits already locked in



To Do Lists

- Coaching priorities
- NPS detractors
- Complaints for review

Balanced Score Card

- Ability to resolve
- Low effort
- Customer experience (NPS)
- Adherence

“NPS has seen a meteoric rise since COACH came in. It’s a great place to work.”
Rod Archer,
Advisor

“Simplicity was key, it is going to make the life of our managers easier”
Sajid Chopdat,
Architectural Design and Programme Manager

managers are presented with simple TO DO Lists and performance is managed through a balanced scorecard that enables focus on the customer and behaviours that drive tangible, incremental improvement (see boxouts). Crucially, all the dashboards are very easy to use and intuitive; there’s no need for detailed explanation or training. “COACH brings it all together, it’s the glue” “Before COACH my daily work and finding the right things to focus on was chaotic”.

Customer Strategy: 5 steps for the BT experience

- **Understand** – what the customer really said in order to respond in the right way. It’s critical; get it wrong and the whole conversation goes wrong
- **Acknowledge and diffuse** – get the customer to a space for a conversation, give them confidence there will be a fix
- **Identify** – where the problem sits; question to get to the root cause
- **Investigate** – use diagnostic tools and flows to find the right outcome
- **Resolve & close** – as far as you can, give confidence the issue is owned

These steps, which run through all customer conversations and all supporting tools and insight, have driven NPS up 12 points in the UK, 18 offshore since October. All detractors get a call within 48 hours to close the loop and resolve. “The 5 steps are a gift to managers, advisors and customers” “They help us listen more” “It drove change straight away”.

Focus coaching to enable better conversations

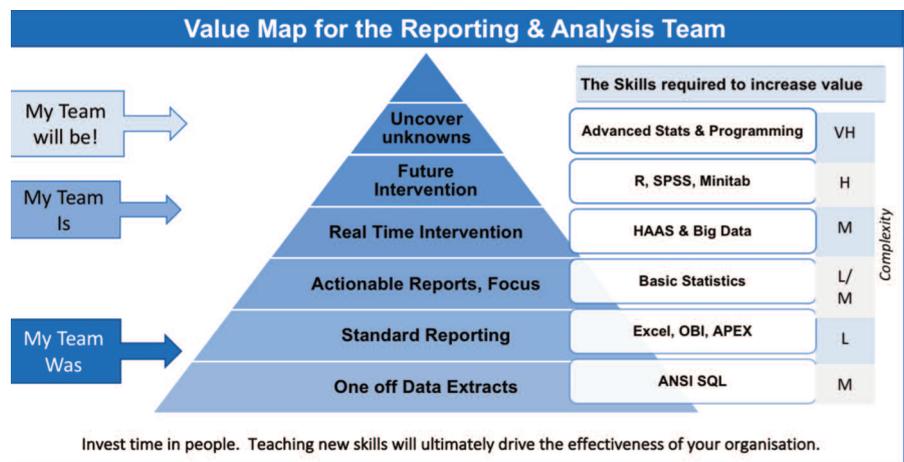
Operationalising the 5 Steps has completely changed the coaching approach. There are no quality scores anymore. Instead, the focus is on behaviours and opportunities for great conversations. Development opportunities are highlighted via the structured template in COACH. 45 minutes per advisor each week is scheduled for coaching; these sessions are structured, consistent and deliver real learning. They support advisors to build the 5 steps in to every customer conversation. As COACH has automatically prioritised customer contacts for coaching sessions, advisors know they are going to get value from each session, which is vital. It’s early days but handling times and end-to-end customer journeys are reducing and first contact resolution is increasing. Engagement is on a steep upward curve. “Coaching is more focussed and positive” “Development opportunities are customer led”.

“Teaching new skills will ultimately drive effectiveness.”

David Bruce,
Head of R&A

“If the behaviours are right, the numbers will be delivered.”

Chris Howe,
General Manager Channel



BT Consumer is the main retail division of BT Group providing fixed-line, broadband, digital tv and mobile to UK Consumers, with a global operation of around 10.5k advisors & 750 managers. The Reporting & Analysis team are responsible for structuring and sharing actionable data and insight often using innovative techniques and in-house built solutions.

BT Consumer Case Study continued

The BT experience & the 5 Steps

The 5 steps trace back to improvements in the webchat experience with offshore partners. When the chats were stripped back to 5 steps, leaders quickly realised these would work in voice too. This approach has now become the BT experience. Advisors are coached to stay personal – making it feel as though it is their own broadband that has gone wrong, and having the curiosity to get to root cause of issues. Not everything can be fixed in the moment so it is vital that advisors manage expectations and instil confidence with the customer throughout the conversation. All customer feedback is categorised using the 5 steps to support coaching and development. “Customer’s feel it’s not scripted” “It’s not one size fits all”.

Grumpy Mr Mackenzie: bringing the 5 Steps to life

Rolling this out was a major undertaking, but the Training Team really brought it to life. Leaders were coached first with support to help them “make coaching personal” for their advisors – focussed on what the insight/data tells them, and coaching on behaviours not numbers. The team then devised grumpy Mr Mackenzie, a fictional customer (multi-generational household, hardworking, likes a bit of FIFA online, his family shop online and his wife works at home uploading big documents). Using interactive CBTs and actors to play the character they created various scenarios for advisors to listen to calls, respond and be coached on. “Mr Mackenzie brought the 5 steps to life” “Active listening is the biggest thing I’ve learnt”.

The Journey of the Reporting & Analysis Team

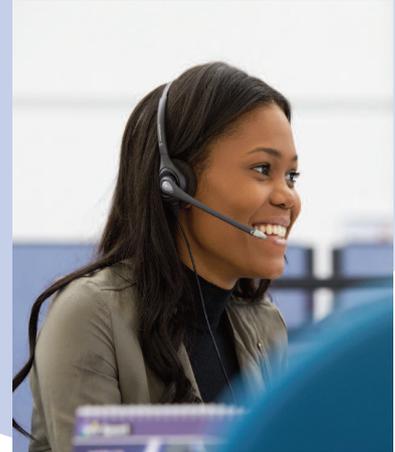
R&A was born from several local teams with different skill levels and methods. The mission is to “enable Operations to deliver best in class performance and achieve their customer experience goals”. Centralisation has created consistency and this has required upskilling, to build new technical competence and become both customer focussed and agile. Report production has been automated with robotics, creating time for skill development, with the ambition of becoming a team of data scientists. They are able to provide innovative insight at speed which meets the customer need; key individuals listen to the problem and design the solution. As a result, they have become integrated in the business, seen as a value-add, always being asked for help and always delivering. COACH is a prime example of their creativity, agile delivery and innovation. “Engage with stakeholders rather than building from specs” “It’s been a collaborative approach”

COACH – customer priorities for coaching

The prioritisation logic looks for challenging calls that could contain customer distress or indicators of future distress. This was built using a rules based engine; machine learning to enhance these rules is being investigated. Points are assigned to various activities at a customer level and combined to give a score. Calls with the highest scores are prioritised. Examples of logic points:

- Customer Effort – the amount of time the customer has spent interacting with BT, how many contacts and time spent
- Processes completed on the account, using insight on how they impact customer effort, complaints etc. This can easily be updated to focus on processes that need to be prioritised at a particular time
- Activities such as engineer call outs. If a call out is missed, for example, this raises it’s priority
- Complaints can lower the priority, as they already have a review and escalation process in place
- Feedback scores can lift the priority

“COACH highlights customers in need” “Customers who need our help”.



“You can see where you sit in your role, performance information is all in the same place. I check my dashboard every day.”

Kevin Wood,
Advisor

“It all links to our wider goal to be number one for customer service. COACH feels like we’ve got the tools to match the aspirations of the company.”

Helen Scotney,
Advisor

“COACH has aligned everyone’s thoughts to the customer in the same way.”

Kay Appleyard,
Team Leader

“We’ve moved away as a business from talking about numbers. Challenging conversations are where we can learn.”

Laura Hawbrook,
Team Leader

“Before it was like looking for a needle in a haystack, but I really enjoy my coaching sessions now.”

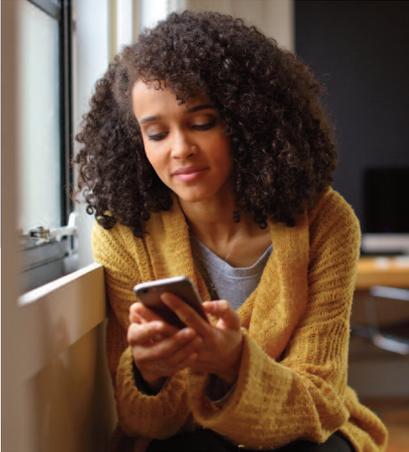
Kris Ziarko,
Advisor

“Our priorities are aligned now. COACH gives consistency, leaders are focussed on the same objectives.”

Adam Anderson,
Lincoln Call Centre Manager

COACH – identifying process improvements

Customer insight, through COACH, is playing a key role in identifying and raising process improvements and highlighting critical customer issues for proactive resolution. The ‘elevations process’ in COACH enables managers and advisors, through a coaching session, to identify where process failures impacted customer experience. Through a simple template they can categorise and detail the issue and it is allocated automatically to the right team to own and fix it. Feedback on issues raised is provided back to the operation to close the loop. Equally, where the coaching session identifies a customer who needs more senior intervention, for example one that is likely to move towards an executive complaint, this can be raised to the appropriate channels for proactive action to resolve the issue and prevent it becoming that complaint. “We’re much more agile now, we’re dynamic” “It’s simplified the feedback loop”.



“It’s so much easier to have everything ready, you feel prepared for the coaching session ahead.”

Simon Young,
Team Leader

“Customer experience influences coaching, coaching influences performance.”

Julie Etheridge,
Director of Service

“No-one taught me how to shop on Amazon but I can spend a fortune because it’s so easy and intuitive. COACH is like that.”

Maurice Roche,
General Manager Compliance & R&A

Making data accessible and intuitive for front line managers

Buried in hundreds of thousands of calls each week there are thousands of customers who really need their WIFI fixed quickly and think they need an engineer to do this. Sending an engineer is an easy solution but not always the right solution. It may be the advisor needs to send a replacement hub, educate the customer or make an online change. Sending an engineer out inappropriately: does not resolve the enquiry, wastes the customer’s time, delays resolution, costs money and reduces engineer availability. By heavily prioritising these processes into the COACH tool the managers were able to have effective coaching conversations that changed behaviour – cutting repeat contacts, customer effort and engineer cost and also deliver faster responses for the genuine need. This is all about listening to and resolving the real problem, not waiting for an engineer visit that isn’t needed. Employee engagement survey results are up three points for managing people, six points for ‘leaders are role models’ and three points for ‘we are supporting our people to deliver brilliant customer experiences.’ “We talk about fixing customers before fixing the problem” “We’re looking where the real opportunities are”.

Our ‘Power-Up’ tools ... shifting power back to our teams

