

# CCW Vegas 2019 - ProcedureFlow



# CCW Vegas 2019 - ProcedureFlow

## ProcedureFlow

*Micah Peterson, VP of Product Management, and Amanda Verner, Marketing Manager, ProcedureFlow offered details about their innovative training solution designed to visualize the way subject matter experts think to help guide new agents through the process of learning complex procedures.*

***Please tell us about the inspiration behind ProcedureFlow and what your solution can do to help successfully compress training time.***

Micah: I'm from eastern Canada which has been a hot spot for call centers since back in the 90s. There was a company doing tech support outsourcing work there, which had an eight-week agent training program and a 900-page standard operating procedure binder. When agents finally completed that ordeal, they'd sit in their cubicle and after taking the first couple of calls, many would start crying. It was horrible. The company was missing SLAs (service level agreements) and not meeting expectations. They knew they needed to radically change how things were being done, so they built their own highly effective performance support tool. This took training from eight weeks to a two-day orientation. The agents were a hundred percent confident to start on that second day.

***When was that?***

That was around 2001. The company kept the solution for themselves as a competitive advantage for about 10 years. In 2011, I joined the company and we turned it into a cloud-based product, then spun it out as its own company in 2015. We've experienced a lot of growth in the last few years.

***It seems like there would be more involved than simply taking all the information in a manual and putting it online. Can you walk us through how it works for the agent?***

First, there is the challenge of trying to train people. The situation in most call centers is that they have about 12 months before agents either get promoted, are managed out, or leave on their own. It's a very short window for the call center but many apply a traditional training model that takes six to 12 months for agents to become proficient. That kind of timeframe is a luxury because of the high turnover rate. When it takes 11 months for someone to become fully productive, who's then gone a month later, that's a broken model. At ProcedureFlow we're totally changing the way businesses onboard agents. We offer a program that enables new hires to self-serve through the training process. The only way that can be done is through better documentation. If you look at the way most documentation is set up now, it's in paragraph format, like a book. When an agent is on the phone with a customer, they don't have time to read paragraphs of text. The other alternative is often a six-month traditional training model to create visual cues that the agents can use while they're on the phone with the customer. Accomplishing that in a shorter timeframe is what ProcedureFlow is about. Our program takes written paragraphs and turns the information into small hyperlinked flow charts or visual colorful guides where the colors, shapes, and arrows have meaning. The agent can easily use it while on the phone with the customer.

# CCW Vegas 2019 - ProcedureFlow

***If the customer has a question and the agent's not sure of the answer, how do they pull up that information? Do they find it through keywords?***

That's a great question because efficient searching has always presented a major challenge in knowledge management. There are two key questions; how do agents find what they're looking for and can they read and interpret it? The first one is difficult, especially if they're new and don't really know what to look for. The second is an ongoing challenge, can they consume and communicate information on the fly? ProcedureFlow eliminates both these issues. Agents won't need to search for anything. We help them from the moment they initially take the call; guide them through the authentication; through their issue; through probing questions; all the way to what standard operating procedures they should execute. This is all represented in the flow. The agents can self-serve all the way through the call. Since they never have to search for anything specific, agents can just flow right through it.

***With agents following a complete Procedure Flow, what is the impact on training?***

From a non-trainer's perspective, it would be a way to cut the duration of the program. We can cut a business's training time by 50 to 90%. If the existing training model is not changed, training will be around 50% shorter. To diminish the length of the other 50%--that lecture style piece-- a business needs to change the way it does training to be more scenario-based. Once agents are brought into the classroom and immersed in ProcedureFlow, trainers need to ask "what is the best way to provide agents with workable scenarios involving customers, their common issues and the problems they wish to solve?" Once the agents understand the flow, new agents can just jump out and start doing the work. We can cut training time by up to 100% if the organization is willing to take these steps.

***When you say up to 100%, you mean there's no training needed?***

That's right. If you go back to the original company that built this for themselves, they went from eight weeks of classroom training to a two-day orientation discussing simple things like here's your badge, here's your cubicle, the rest room is down the hall. Then they brought the trainees into Y-Jack calls that agents were taking. With no effort or expense on the organization's part, beyond the Y-Jack set, they were able to determine the system's working, hear conversations and have ProcedureFlow on their own iPad or laptop. When new agents feel confident that they're ready, they'll jump into the cubicle and get going. That is a full 100% reduction in training time.

***Do you have any feedback from agents who've been trained in other environments vs being onboarded with ProcedureFlow? Have there been any surveys to learn about differences in the process and how it affects their motivation and preparedness?***

There are several different types of agents who could make comparisons. Agents who worked in call centers with traditional training and later experienced ProcedureFlow. What we've heard anecdotally is seasoned agents see an incredible difference and can barely believe how much easier it is with our solution. Those who have no call center experience can't really conceive of how training was previously done. We've also heard stories about agents who've been through ProcedureFlow actually building flowcharts on their own time when they come to other companies that only offer traditional training.

# CCW Vegas 2019 - ProcedureFlow

***Would it be accurate to say, agents trained with ProcedureFlow don't need to be product experts because the solution takes them through everything and gives them 90% - 95% of what they need to know?***

I like that question. A few years ago, I was thinking about why contact centers exist and had a revelation about the human brain, which is the most amazing machine in existence. If you think about the contact center as being analogous to a human brain, it exists because processes are always changing. If they were stagnant, you could automate everything and not need humans. We put humans in the mix because they're so adaptable to change, and these human brains drive the contact center.

With Knowledge Management, you're always trying to capture a flow of what's happening in the brain of your subject matter experts. We did a pilot program that involved mapping out the knowledge of someone with extensive experience handling complex telecom issues. We had a new person working with us who commented "it was a privilege to be a part of this pilot because I felt like I was staring into the mind of somebody who had been doing this for years." Using small hyperlink flowcharts is almost like diving into an expert's head and navigating their brain. When new agents deal with exception handling, this knowledge enables them to surf through the mind of a subject matter expert who can deliver the highest call quality, lowest average handle time, and greatest customer satisfaction via ProcedureFlow. The business is thus enabling 100, 300 or 1000 agents to operate as efficiently as its best person.

***It seems almost like cloning new agents to succeed. Do you find when they're more comfortable and able to help customers that they can be retained longer?***

Aside from providing a high salary or unionized benefits, I'm not sure any business can keep a high percentage of the call center agents longer than two years because people get bored and want a new challenge. Most attrition is generated in the first 30 -90 days, and that is a result of people just being overwhelmed. We've seen situations with our customers where people left after a few weeks because they thought they could work at a coffee shop and make the same money without constantly being attacked by QA people. If you give them confidence and can impart the knowledge of the best agents, it can be a game changer for early attrition.

***I would imagine that the quality level is consistent across the base of agents in any company using ProcedureFlow because they're following that same flow and using the same information.***

There's a funny story in the book "The E-Myth Revisited" by Michael Gerber about his experience with a barber. On his first visit, they put a coffee in his hand, tell him what they're planning to do, trim his hair and get everything done quickly. He's impressed and goes back again. This time, no coffee, but the haircut itself is still good. He thinks perhaps they just forgot. He returns a third time, still no coffee but they suggest shampooing his hair first. In all three experiences, he received a good haircut in a reasonable amount of time. He stopped going because what he ultimately wanted was consistency. This brings up the hypothesis that a business could have 20 experts in a 100-seat contact center and a customer could talk to two different experts in separate interactions and get totally different answers. Even though the people are experts, by giving different answers, they're giving the customer a weird sense about the brand. Consistency is so important. That's why we believe it's important to want to bring your agents into one process that everyone agrees upon and have everyone execute. No matter which agent the customer calls, they're always going to get the same story.

# CCW Vegas 2019 - ProcedureFlow

We have reporting data that shows how the agents are using the flows. Higher level executives can see the start of processes and ask the team to provide the best path. A company can consult its legal team to ensure that the right disclosure is being used and if the direction mapped out is logical. The marketing group can ensure that a program is not too confusing for customers. The business can work with different departments to evaluate what has been visualized. Having a number of eyeballs look at plan being mapped out to do continuous improvement would be common practice for any Lean Six Sigma organization. ProcedureFlow provides a vehicle for continuous improvement right out of the box.

***Is there anything we didn't touch on that you think is important for our audience to know?***

I consider myself an industry outsider because I never really envisioned getting into the call center space. I don't know if many people start out thinking as kids of being involved in this industry, but I'm in it now and I am enthusiastic about improving customer service. From my vantage point, when I come to conferences like CCW and see hundreds of vendors talking about omnichannel, chatbots, AI, and other technologies that are mostly cost reduction tools, I'm at a loss. I believe the game is expertise. When customers call in, will they be speaking with reliably knowledgeable agents? Does it make sense to spend so long bringing agents to proficiency just to see them leave? That's a big problem which few companies are trying to solve. Instead of trying to better use human capital, they're looking to deploy expensive technological solutions that aren't always as effective as properly trained human agents. If a company can onboard a successful agent who feels comfortable in the role after a week or two and remains productive for nearly a year, doesn't that improve the customer experience for voice, chat, or other omnichannel touchpoints? I believe the biggest challenge for call center operations is developing subject matter expertise in a consumable format.