



The Complete Guide to Leading Contact Center Teams



LIVEVOX

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Introduction

So you want to be a contact center operator? Or maybe you're already managing a contact center and are looking for ways to develop talent while increasing collaboration across your (remote) team. This is the guide for you.

This eBook covers the scope of what it takes to manage a well-oiled customer support machine, from the forward-thinking trends taking the industry by storm to the nitty-gritty of forming teams and cultivating talent, we put forth formulas for how to **grow your career**, **engineer a learning culture**, and **inspire continuous improvement** while delivering on business goals.

We Cover

-  How to connect the dots between time, technology, and resources
-  How to fast track agent performance improvement
-  Leadership skills for managing (remote) teams
-  Agent onboarding and training checklists
-  Must-have skills for CX C-Suites and how to apply them in any role
-  How to move ahead in your contact center career path.

What You Need to Bring to the Table

First, let's start with what a successful customer service leader does day-to-day.

Contact center manager job descriptions usually encompass the development of specific customer support objectives and standards based on the goals of the overall organization. In many ways, the contact center is the first touchpoint for a company, so this can be a very high-pressure, high-visibility position to be in.

Managers monitor agent processes and the effectiveness of support activities. They're responsible for hiring, training, and coaching contact center agents as they interact with customers in their day-to-day jobs. Think of a football team. The contact center manager is the head coach devising winning strategies, running plays, and deciding when and how to execute them. They're tasked with communicating strategic organizational objectives while maintaining a keen eye on compliance and brand consistency. As leaders, they have to guide agents through difficult customer issues, angry encounters, and even sometimes complaints. On top of all of this, they're charged with inspiring agent morale, motivating and improving performance, and minimizing employee turnover rates.

All of that is only the tactical, hands-on aspect of a contact center manager's role.

There are also the high-level strategy and people management components. As Bill Belichick does on the field, the contact center manager sets the entire playbook for the support team. That requires setting agent expectations concerning processes and best practices and providing the right tools, technology, and resources to deliver high-quality service with consistency.

While managing a team, they also manage up, working in a consultative fashion with other organizational leaders to budget and track expenses, communicate contact center stats and trends, monitor QA, and prepare performance and KPI reports for upper management.

To develop into the contact center leader of the future, you need to be able to handle all of that while also navigating the sea of change that the industry is in. This means partaking in self-study outside of your role and being comfortable presenting new ideas to your wider organization.



What Makes a Manager Great?

Great call center managers can **align agents, resources, and systems** to meet strategic goals. What are some qualities of great call center managers? What are their good habits and the actions they take every day to lead their teams, help them grow, and get noticed or promoted?



High EQ

Possess clear communication skills and high emotional intelligence (EQ)



A Hands-on Approach

Give candidates and team members a real-time look at the job through shadowing and trials



Decisiveness

Having a must-have criteria list so candidates can be objectively evaluated

5 Skills Every Contact Center Agent Needs to Master Right Now



Communication skills are essential in the contact center.

In-person communication involves nonverbal cues like eye contact, posture, and facial expressions. But, the nature of the contact center cuts out vital visual language cues. An agent cannot gain any insight from a customer's body language over the phone or via messaging. So it's essential to train your agents to learn customer service skills that maximize cues from the conversation to supplement what is lost by not being face-to-face.

1. Active listening

Active listening is a technique of careful listening and observation of non-verbal cues, with feedback in the form of accurate paraphrasing, that is used in counseling, training, and solving disputes or conflicts.

Active listening is a practice that keeps you engaged with your conversation partner positively. A few key features of active listening are:



- **Neutral and non-judgemental conversation**
- **Demonstrating patience**
- **Feedback to show you are listening.**

Active listening makes customers feel acknowledged, promotes cooperation, and reduces misunderstandings. Active listeners approach each conversation to learn something. They maintain focus on the speaker and ask clarifying questions. This practice not only helps agents better understand issues and resolve problems efficiently, but it also encourages trust and promotes a sense of being valued. **Two very important aspects of leading a team.**

Train agents to pay attention to details customers give. In a LiveVox Thoughtline episode, Tracey Zimmerman, President & CEO of Robots and Pencils, a digital innovation firm focused on transforming business with mobile, web, and frontier technologies, [encourages](#) her agents to paraphrase once a customer has finished speaking and to use phatic expressions (mmhms and uh-huhs) while the customer is speaking in order to show empathy and understanding.

Coaching for attentiveness shows agents you know their time is valuable and teaches them to show customers the same consideration when taking care of their needs.

When training your agents to be more active listeners, focus learning activities around the acronym **RASA**:



- R** Receive the information
- A** Appreciate with phatic expressions
- S** Summarize
- A** Ask questions after

2. Clear Communication

Countless books have been written on the importance of communicating clearly. Clear communication involves learning how to say more with less while still delivering the maximum impact with your words.

Communicating clearly in the contact center is demonstrated by:

- **Understanding what customers are trying to say**
- **Responding in a way that makes sense**
- **Being direct about the issue(s) at hand while showing empathy.**

Coach agents to be upfront about hold times, options, and what they will be doing while putting customers on hold.

When customers ask questions, an agent should be trained to answer concisely and in a natural tone of voice. The same applies when posing questions to your customers. Agents don't always need all the details surrounding customer answers to their questions. This can be difficult for agents to adapt to, especially when answers are technical. But employing clear communication techniques will help agents to bridge even the biggest jargon gap.

Like active listening, clear communication takes practice. Training that involves roleplay is highly effective. Activities like this draw attention to the importance of clear communication as well as give support team members a chance to practice.

3. Empathy

Agents with empathy understand what your customers feel and are compassionate towards them. Empathy helps agents provide an experience in which customers feel respected, understood, and supported.

Managers should train support teams to use language that demonstrates empathy. When customers hear their feelings reflected it gives them confidence that you see the problem as being just as important as they do.

What empathy looks like:

- **Insisting on seeing a problem all the way through to resolution**
- **Accurately labeling a customer's experience and mirroring the phrases they use. For example, "I can see how that would be frustrating."**

4 Ways Managers Model Clear Communication



Use Emotional Intelligence



Practice Self-Awareness



Practice Turn Taking



Practice Active Listening

4. Positive Language

Words have power. Consciously or not, the language we use shapes each conversation we have by influencing how others feel during a conversation.

Think of language choice as the light you are using to illuminate the point you are trying to make. Positive language is like a golden hour—flattering and pleasant— while negative language is more akin to fluorescent light bulbs—harsh and unforgiving.

Make a conscious decision to train your agents to frame each conversation with positive language. Since there are no body language cues, support teams must rely on language as a substitute.



Positive Language

Tells what can be done.

“I can finish setting up your account just as soon as I get authorization.”

Is helpful and encouraging

“It’s good that you called in when you did, otherwise this could turn into a real problem.”

Emphasises alternatives and choice

“If you decide to cancel after that date you will get one more month of service.”

Though these differences are subtle, they are quite impactful. ●

Negative Language

Tells what can’t be done.

“I won’t be able to finish setting up your account until I get authorization.”

Subtly places blame

“If you would have called in earlier we would have been able to fix this without issue.”

Emphasises negative actions or consequences

“If you cancel after that date we will charge you for another month.”



5. Creative Problem Solving

Education is key to sharpening creative problem solving skills. With more knowledge, agents can see the full range of options and apply them intuitively as circumstances require. The more your support team knows about your products and services, the better and more creative they can be when answering customer questions and solving problems.

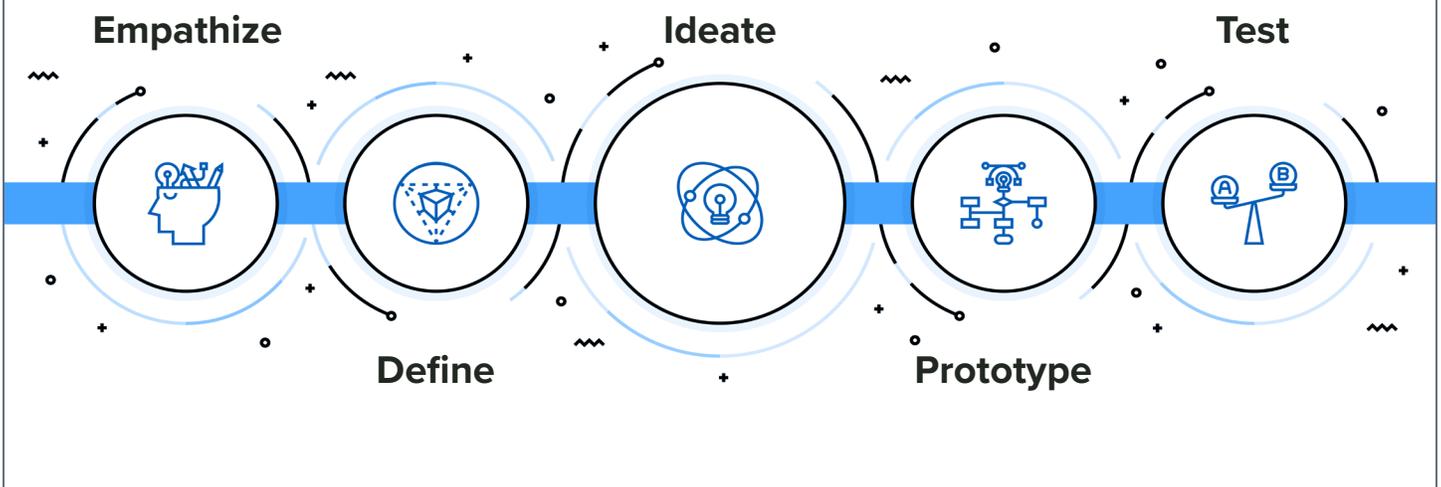
Managers can encourage creative customer service skills by empowering agents through training and technology:



- Provide lists of pre-approved compensations for disgruntled customers
- Learn to admit mistakes
- Look for common ground with customers
- Encourage out-of-the-box thinking

Employ Design Thinking

Despite its moniker, design thinking isn't just an exercise that falls exclusively within a designer's domain. It's a critical framework for creative problem solving that invites practitioners to redefine problems in order to identify alternative strategies and solutions that might not be instantly apparent with an initial level of understanding.



Source: [Forbes](#)

5-Point Checklist for Training New Agents



Onboarding new hires is overwhelming in any field, but even more so in the contact center industry.

Aside from getting acclimated to a bustling, busy environment and learning their way around a whole new set of tech tools, agents must have their skills put to the test in front of real, live customers. It's a lot of pressure!

The contact center industry is notorious for its high turnover rates, and one of the main reasons for this is a lack of proper training and development. If you want to avoid the costly expenses and damaged morale that come with high turnover, the journey starts on the very first day of a new agent's job.



Empowering agents for improved customer service

70% of agents say that empowerment to take action when a problem comes up is important to their engagement at work

1. Tailor desktops by role & familiarize new agents with tech tools

When onboarding new contact center agents, our focus tends to go first toward the customer-facing component. After all, agent performance is one of the strongest drivers of customer satisfaction. And yet, their customer interactions are only one piece of the puzzle. Positive interactions can't happen without the agent having a solid knowledge of the technology they're working with.

Tailor agent desktops by role to ensure only the most vital information is displayed to them. Use training videos and interactive modules to help new agents learn to navigate your contact center software. In your training sessions, cover a wide range of scenarios that familiarize them with the various tech tools at their disposal, like your knowledge base, CRM, internal chat, scripting views, and speech analytics capabilities.

Your agents can't properly use these tools to solve your customers' problems if they've only heard about them. Give them the knowledge to navigate engagements with confidence on their own.

2. Use your most—and least—successful calls as training examples

Your contact center software gives you full visibility into every interaction that takes place over your system—use it. One of the best ways for new agents to learn how to quickly resolve customer problems is to see it done successfully by more seasoned staffers.

But don't just hold up the five-star calls as training items; use unsuccessful calls as an example as well. When agents can hear where things went wrong in some of your low-rated calls—and see what was going on on the agent screen, too—they'll be better able to identify at-risk calls and take measures to recover the interaction.

3. Provide targeted coaching

Once your new agents are ready to take to the phones, providing early and frequent coaching is key to helping them reach maximum effectiveness as quickly as possible. The best agent feedback is targeted, specific, and actionable.

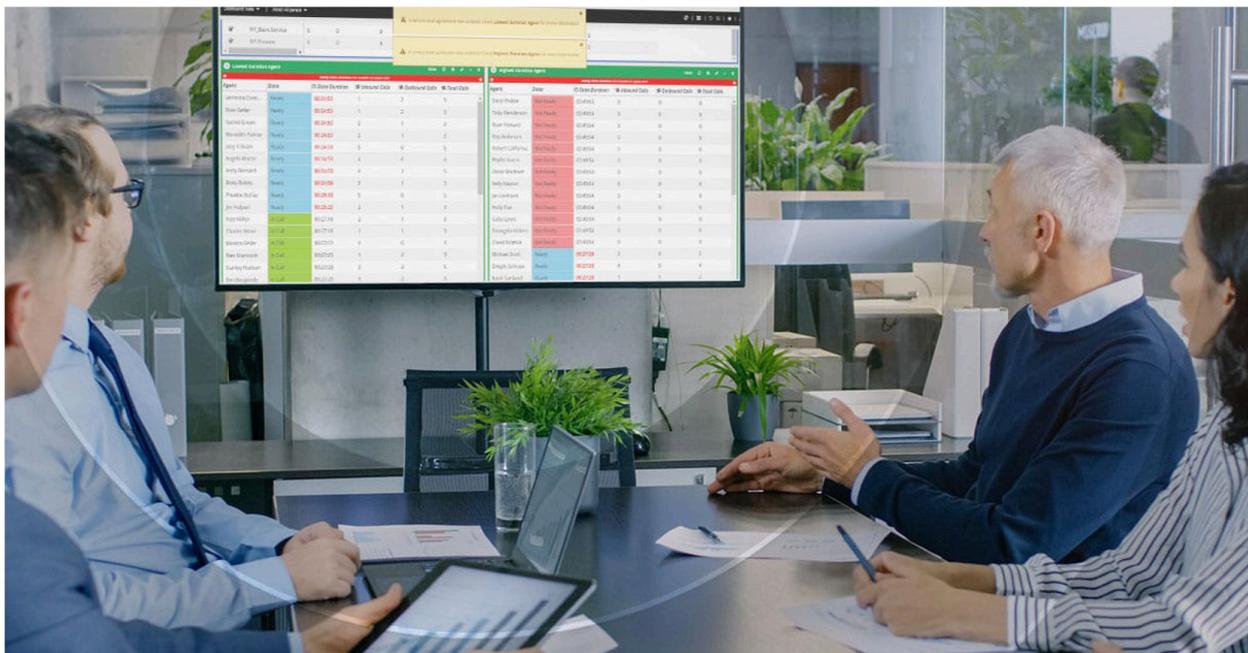
Use synchronized call and screen recordings from your contact center software to compile detailed notes, then review them with your new hire while watching/listening to a live playback. Agents need to understand not just what's being scored, but why, so they can apply your coaching more broadly to all of their future interactions.

4. Set goals

Good contact center managers regularly check and report on metrics. Great contact center managers know where their key metrics stand at all times. And the agents working with them do, too. Training high-performing agents starts with early goal-setting, and fair and objective goal-setting starts with data.

Set goals and up the ante by sharing performance data in real-time either on in-office wallboards or in shareable dashboards when working remotely.

Have you ever been on the floor of the New York Stock Exchange? There's something about being able to see the flood of numbers come in that brings out the competitive side of people!



5. Use scripts to bolster confidence

Confident, competent agents are the fastest route to satisfied customers. By using a streamlined, structured onboarding process that incorporates predefined scripts you're arming agents with a tangible reference point for taking control of situations. Moreover, continuously referencing available scripts helps build good agent habits from the start. Communication skills are essential in the contact center.



Upskill Sidebar

Personalize Learning Experiences

Personalization doesn't stop at customer experience, it extends to agent experience, too.

Spend meaningful time during new hire onboarding familiarizing agents with your key performance analytics like average handle time, service level, first call resolution, abandonment rate, and customer satisfaction. Together, go over your expectations of what's acceptable for new agents and where you'd like to see these metrics fall in their first 30, 60, and 90 days or whatever time frame is relevant for your organization.

Your contact center software should make it easy to pull individualized performance reports that show you exactly where an agent is succeeding and where they're struggling so you can monitor their progress and tailor their ongoing coaching needs accordingly.



How Should You Structure Omnichannel Teams?



In an omnichannel world, customers interact with agents in a variety of ways.

Whether through a call or chat, customers expect the same level of service and support. Before there were multi-channel options, a contact center manager hired agents that specialized in answering or making calls. Employees were trained in the same way with the same scripts and required a similar skill set.

Now, with more customers choosing to interact via digital messaging channels such as webchat, contact center managers need to reimagine how to structure, and train, their agents to provide the best service across platforms.

So what is the best way to think about structuring your omnichannel teams as a manager?

Consider the difference in service execution across channels

The types of questions agents are fielding through chat and voice are likely similar, meaning the types of content training won't necessarily differ. However, the execution of service is different. This means the skills you're looking for in each type of agent begin to diverge.

Voice agents interact one-to-one with customers—they can only field one call at a time—and use speech and verbal cues to interact. Chat is a different beast altogether. Agents are often handling several chats at once, so they need to be strong multitaskers and written communicators.

Based on these distinctions, it would seem easiest to hire two separate teams completely dedicated to either voice or chat and trained in only those skills.

However, this is not your most efficient option as a manager.

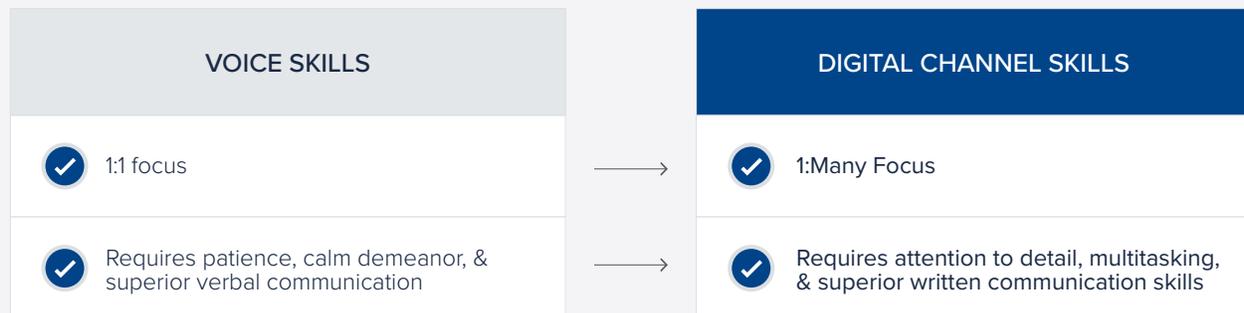
Consider a scenario of two completely separate teams: It's a busy day in the contact center. Call and chat agents have answered a steady stream of customers. Suddenly, halfway through the day, the chat queue is 10 customers long, while the call agents are sitting idly by. If you have two separate teams only trained to handle their specific types of interactions, customers sit waiting in long queues, while call agents sit idle waiting for their next calls.

How do you solve this? The logical answer would be to find multi-skilled agents that excel in both voice and chat communication. However, this is challenging given the unique skill sets required to be successful and involves a significant amount of additional training.

You can run your contact center with either of the scenarios already mentioned, but there's a better way. You can find a middle ground between these two ends of the spectrum to create a highly efficient omnichannel contact center.

Go Hybrid

Go hybrid and introduce both voice and chat-specific teams, as well as agents trained in the nuances and specifics of both channels. When you only train agents for one specific channel you'll have calls or chats queuing up depending on how you've allocated agent resources, adding to hold times and negatively impacting the customer experience. How do you strike a balance?



You **can** build a hybrid model of omnichannel-proficient agents in your contact center. You should still hire core voice and chat agents—that is, agents who specialize in 1:1 voice calls or written conversations. To cross-train and move toward a hybrid staffing structure, you then select a percentage of each of those types of agents and train them in the other communication methods. This means that of, say, 15 voice agents, seven of them will also be trained in chat and SMS, and of another 10 chat agents, 5 are also skilled in voice communication.

Building your contact center this way does not mean that those voice agents who are double-skilled in chat switch to chat every single time they don't have a call. It does mean, however, that if your contact center finds itself in our earlier scenario—a long queue in chat and low volume of voice calls—you have agents trained and ready to jump in.

Once you've selected your group of double-skilled agents, you still need to determine how and when an agent moves from their core skill to their second skill. Read on.

Designate and Prioritize Agents

Give your agents a priority designation. For example, your chat agents will receive top priority for a chat. A voice agent will receive top priority for calls. A chat agent also trained in voice will get the next priority level for voice. This ensures that if they're available, and there's a queue in chat, they'll be able to fill in and provide the excellent customer service your clients expect with a level of continuity that will distinguish your brand.

Then, consider implementing a conversational front-end IVR that allows you to distribute incoming calls and chats, after self-service options have been exhausted, based on predefined criteria gathered upfront before connection to save on agent handle times. Be sure to choose an IVR that can route the engagement, regardless of format, to the appropriate agent. It is also important to consider an IVR that functions in the cloud to accommodate remote agents.

Once you've structured your team in a hybrid model and configured your IVR to recognize the specified criteria, you can use the data captured from the IVR to further refine your blended team model. You'll be in a position to answer questions like:

-  • Are the agents selected to be double-skilled performing at the level your customers expect?
-  • Are your double-skilled voice agents excelling on chat?

This data can help you refine and develop more efficient workflows while working to upskill agents and provide greater career opportunities.

How Should You Tool Agents?



Leading a team starts by simplifying your agent experience with the right tools.

When agents have the right tools that are up-to-date and dependable, they are empowered to focus on customer service and can be coached to more effectively manage tasks because they're not distracted by technical issues and having to navigate five screens to answer a simple customer inquiry.

Agent tools include a unified desktop experience, customized dashboards, and comprehensive scripts. Offering integrated systems in your contact center simplifies the experience for the agents, which ultimately leads to better customer service.

Unified desktop:

Eliminate the hassle of toggling between screens when time is of the essence and present agents with the information and context they need to succeed from a single window. Agents can engage customers on their channel of choice with a single user-friendly interface that makes it easy to converse across every channel.

Agent scripting:

Flexible agent scripts pull together all of the relevant information your agents might need for any interaction. With dynamic agent scripts, you can guide agents through a variety of customer interactions including onboarding, account servicing, support, and sales. By leveraging scripts, you help agents, and your business, drive performance while mitigating risk.

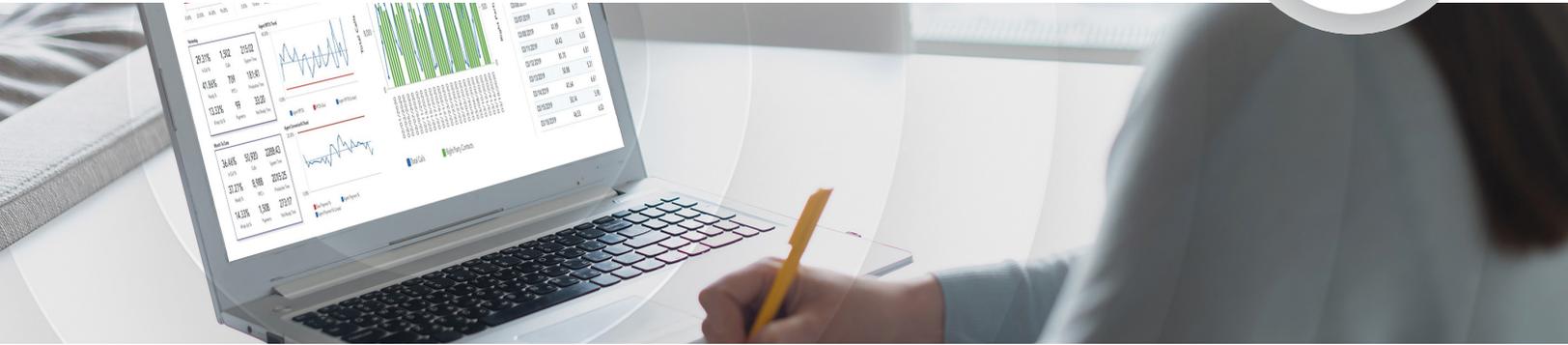
Adding customer self-service tools also simplifies the agent experience. By incorporating options like virtual agents and an IVR, you reduce the workload for agents, allowing them the time and opportunity to have quality interactions with customers on the topics best suited to human-to-human interaction. These systems also collect the necessary information, helping to route customers to the person best equipped to handle the issue.



Agent retention is key

Agents that feel engaged in the contact center are **15%** less likely to head for the door.

Always be Coaching



According to Harvard Business Review, [onboarding is the most critical](#) period in an employee's time at a company. Meanwhile, the industry [average for agent turnover is 44% in the contact center](#), with a lack of training and development often cited as a key reason for agent attrition. Therefore, providing the right resources is critical for long-term success.

Just like the quarterback acts as an on-field coach, contact center managers serve as team coaches that acknowledge individual agent obstacles and make recommendations for how to overcome them.

As contact centers have pivoted to remote work, eLearning allows managers to provide targeted, effective, and trackable coaching for their teams while also making it easy for agents to advance their skill sets and address growth needs.

Implement feedback loops for improvement

After onboarding and initial training, agents still need, and on high-performing teams, want to receive feedback, improve, and excel. Implementing systems to allow for easy evaluation, corrections, and recognition go a long way in making agents feel valued and successful.

Speech analytics overcomes employees' concerns about an unfair evaluation process by automatically scoring 100% of conversations that provide objective feedback. The information is made available immediately and allows the agents to feel like they'll be evaluated fairly and consistently. This consistency can give agents the confidence that good work will be recognized and rewarded.

You can also use speech analytics to transcribe and score all of a contact center's customer engagements, giving you an unbiased and holistic understanding of performance. Through these insights, you can learn where agents may be falling short or where they're excelling. Contact center managers can pinpoint the challenges and use successful interactions to train and improve execution. Speech analytics can help inform training strategies to ensure consistent quality across all customer interactions.

Screen and voice recording also help to capture agent interactions and to assess each interaction based on the customer's sentiment and the outcome of the call.

Providing agents with feedback to improve is one of the best ways to empower your agents to be successful. [70%](#) of agents say that empowerment to take action when a problem comes up is important to their engagement at work. By providing the tools and time to uplevel agents, you are creating an environment that makes your agents feel valued. Show your agents you trust their judgment and allow them to continue to improve.

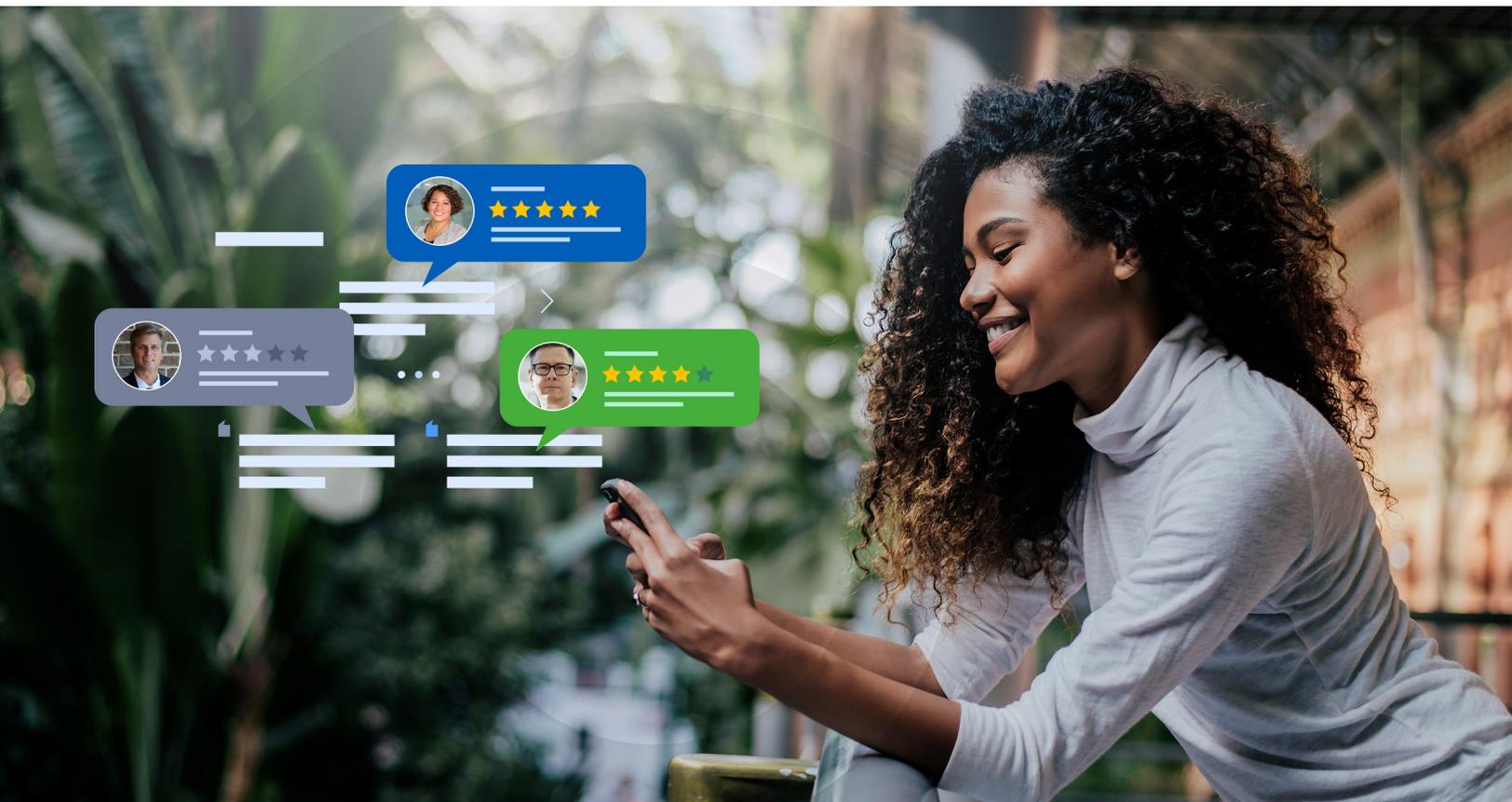
Providing the right tools, training, and feedback allows agents to improve. As they grow in their roles, agents can have more consistent customer interactions, improve outcomes, and increase success rates. By investing in the right areas, you can reduce agent turnover.



Pinpoint Areas of Improvement with Constructive Feedback Backed by Data

Constructive, actionable feedback is incredibly important when honing agents' customer service skills. Many of these skills are soft skills that require molding and are difficult to convey.

CSAT surveys can be a great source for collecting objective performance data that also prescribes the corrective actions an agent should take when confronted with similar situations in the future. Findings from CSAT surveys help you pinpoint where to focus training efforts and promote opportunities to practice active listening, empathy, positive language, and creative problem-solving.



Sourcing, Onboarding, & Training Remote Agents: A Checklist



While it's true that we're moving towards a remote working culture, working from home is not for everyone. When building your teams, you've got to make sure that you find the closest match to the job description possible, and if necessary, that can manage themselves independently.

This can't be stressed enough. Hiring the right personas for remote work is essential. One of the key attributes you should look for when sourcing remote talent is independence; someone who doesn't need a lot of hand-holding. Look for candidates who are self-starters and can motivate themselves to take initiative.

During the interview process ask questions like "Tell me about some goals that you have set for yourself and how you went about meeting them" or "How have you found ways to make your past jobs easier or more rewarding?" Asking these types of behavioral questions will help you assess a candidate's ability to work independently as well as reveal their thought processes and problem-solving rationales.

At LiveVox, as a global company with 20+ years of operating experience, we've been working remotely across time zones and regions for a while. In the process, we've developed a few best practices that help our teams stay productive and foster individual contributions.

If you want to make distributed teams work in your contact center, follow these steps

1. Stay connected

Slack, Teams, and internal chat tools are where work happens when you're not in the office. Agent-to-agent internal chats are a non-negotiable need for newly remote teams, especially during the onboarding process when questions are bound to come up or for teams that handle top-tier customers or the most complex queries. Hold regular screen share sessions where new agents get to shadow a senior colleague or mentor on your team. This not only helps in engaging them by providing hands-on training but you can also pass on some of the best practices of the highest performers which builds good habits.

2. Set up buddy programs for mentorship

Create a "buddy program" that pairs senior members of your team with new hires. This not only builds rapport and makes onboarding a more personal experience for the new agent, but it also has the added advantage of opening the possibility for quick help when it's needed during a working session instead of having to wait on someone else for answers. Allot one week to walk someone through your company processes and tools during these 30 to 60-minute buddy meetings.

3. Get agents involved in side projects

Your knowledge base always requires updates as your product or service offering evolves. Allow new agents to learn your product better by having them review self-service articles and keep them up to date. Or, have them conduct call calibrations on their own and create a spreadsheet that categorizes excellent, fair, and areas in need of improvement. These kinds of projects help to get new agents hands-on with a particular topic and provide another way to coach them on best practices in an independent way that solicits their feedback. Bonus: it also makes them better able to find information on their own.

4. Encourage ownership

The most important tenet in running a remote team is being able to trust that your team will get things done. To make that possible, side projects are key. They open up the floor to exploration and ensure there's always work to jump into on a slow day. Encouraging agents to make suggestions and devise their own side projects ensures they'll never be waiting on the next big initiative that needs to be done or tapping their fingers waiting for the phone to ring.

5. Institute team stand-up calls and weekly check-ins

Keep your agents focused and feeling supported with regular stand-up meetings and 1:1 check-ins. Use this time to address blockers or solve problems by committee. Doing so will boost agent engagement and foster more productive collaboration. Bonus points if your stand-ups are themed or otherwise encourage flare!

Training Time

Keep it short and sweet

It's no secret that average attention spans are decreasing.

Contact center training that stays within an accepted attention span window is most effective. Attention span caps for the different teaching methods are:



- **Webinar - no longer than one hour**
- **Online training - between 5 and 30 minutes**

Case studies

A case study provides a real-life example of what it is like to work in the call center. New hires get a chance to see problems in the call center and how trained agents face them. As part of exploring case studies, you can invite star contact center employees to share their experiences and lead trainees through their real experiences.

Role playing

This is a great training method for new hires and veterans alike to put into practice skills they have learned. This is particularly **helpful in practicing soft skills and conflict management.**

Scripting

You can guide agents through conversations with the aid of real-time scripting. Agents gain confidence and pick up best practices by following tried and true scripts.

Testing

Testing allows you to gauge the effectiveness of your lesson. It reinforces information learned and lets the teacher know what might still need work.

The Takeaway:

The good news about the habits and skills we've covered is that they can be cultivated in anybody.

Top customer service agents wield their skills to make the jobs less stressful and more satisfying to do. This often translates to being able to provide great customer service at a low emotional and effort cost. Top performing managers equip teams with technology and tools designed to improve areas that are known to be problematic. This way, agents can combine technological capabilities with innate strengths to create a smoother, more manageable process for themselves, the teams they'll one day lead, and, of course, your customers.



LIVEVOX

info@livevox.com | [844.207.6663](tel:844.207.6663) | livevox.com

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About LiveVox

LiveVox is a next-generation contact center platform that powers more than 14 billion interactions a year. We seamlessly integrate omnichannel communications, CRM, AI, and WFO capabilities to deliver an exceptional agent and customer experience while reducing compliance risk. Our reliable, easy-to-use technology enables effective engagement strategies on communication channels of choice to drive contact center performance. Our battle-tested risk mitigation and security tools help clients maximize their potential in an ever-changing business environment. With 20 years of cloud experience and expertise, LiveVox's CCaaS 2.0 platform is at the forefront of cloud contact center innovation. Our more than 500 global employees are headquartered in San Francisco, with offices in Atlanta; Columbus; Denver; New York City; St. Louis; Medellin, Colombia; and Bangalore, India.