

The KONA Group

'Cold Calling and Call Centre Performance' Case Studies



Because Hope is NOT a Strategy

The KONA Group

Over the last 13 years The KONA Group has become renowned as the 'go to' company for organisations who are looking to ensure that their Leaders, Managers and People are able to perform at the level required to ensure strategies are executed, performance objectives are achieved and critical business results are delivered.

Each member selected in the KONA team is a highly skilled business improvement specialist who works with our clients according to the specific skill-set and expertise required in each project.

They are NOT theoretical 'by the book' trainers or academics who have never run a business, managed a team, or built a Pipeline

Cold Calling and Call Centre Expertise

In many organisations the telephone appointment making is the back bone of their growth and while many organisations have excellent facilities, strategies, products/services and measurement tools and processes, the one key area that is lacking is in the actual conversations people (both inbound and outbound) have with customers

From our experience the main 'gaps' include:

1. Fear of picking up the telephone
2. The ability to engage with a customer and quickly build rapport over the telephone
3. The patience to slow down and find out more about the customer personally and their 'triggers'
4. The belief they need to focus on trying to get through the call to move onto the next one on the list, rather than the quality and conversation of the conversation
5. They have been thrown in at the deep end, with no formal conversational skills training
6. They struggle to respond to a customer when they say "NO"
7. They don't handle negativity or aggressive personalities well

Below are several case studies where KONA has had a huge impact on an organisation and dramatically increased the business results

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Sales Team Not Making Enough Client Appointments

Initial Situation

- 57 consultants making an average of 1 telephone appointment a month (per person)!
- Sales and revenues declining
- Morale starting to drop
- Not engaging with clients over the phone
- Not tapping into clients 'triggers'

KONA Solution and Action

- Introduced a weekly 'Power Hour'
- Coached Managers on how to motivate and drive a Power Hour with their teams
- Developed tools, processes and competitions to motivate the team
- Developed skills to engage with clients, then rehearsed, before hitting the telephones!

Outcomes:

- In **one hour** the team made 361 appointments!!!
- Resulted in a huge increase in new business
- Weekly 'Power hours' now established and increase in appointments has continued

Not for Profit Sales Team Not Making Enough Outbound Appointments

Initial Situation

- Relying on TV and Radio lead generation campaign but not converting inbound leads
- Under pressure from government to maintain funding as not achieving business KPIs
- 2 teams of 19 people in each team
- Both teams making less than 1 telephone appointment a month!
- Team complacent and making excuses
- Managers not driving activity

KONA Solution and Action

- Introduced a weekly 'Power Hour'
- Coached Managers on how to motivate and drive a Power hour with their teams
- Developed tools and processes and competitions to motivate the team
- Developed skills to engage with clients, then rehearsed, before hitting the telephones!

Outcomes:

- In **one hour** one team made 157 appointments!!!
- The second team made 135 appointments
- Total increase of 800%
- Government KPIs now being achieved

Well Recognised Credit Card with Inbound Call Centres

Initial Situation

Worked with 2 different teams including Credit Card Retention team and Inbound Customer Service

- Not hitting their targets consistently
- Team Leaders not skilled in people coaching
- Have product, knowledge and systems training however lacking in essential communication skills
- Don't handle conflict with customers well
- Accept the first reason the customer gives to close their account
- Need to improve their questioning and probing skills to uncover the "issue behind the customers' reason for cancelation of their credit card"
- Lacked "Engagement"
- Culturally didn't understand customers

KONA Solution and Action



Implemented KONA'S 4 phase **A C T C** approach:

- (1) **A**ssessment phase to understand the business, challenges and opportunities, and identify the current and future levels of development required for each individual

(2) Consulted back to clients management team and jointly developed training content and delivery format. The training development included:

- A “themed” approach designed to assist the Customer Retention Team “embrace a more exciting and sales oriented culture” and “shift the paradigm”

- Specific, tailored skills development modules for CSOs with particular emphasis on engaging more effectively with customers, gathering appropriate and relevant information from customers and achieving higher customer retention rates

(3) Trainning modules focussed on increasing the sales team’s “softer skills” so they were to communicate more effectively with customers, to gather appropriate information from the customer and where possible to retain them

(4) A strong emphasise on follow up and Coaching to ensure any training content is implemented and reinforced in the field and not left in the ‘classroom’

Outcomes

- In first 6 months increased customer retention from 32% to 45%
- In second 6 months achieved a further increase to 52%
- Team Leaders now Performance Coaches
- Business Leader rewarded and promoted to a more senior role
- Program now integrated in Induction program and as a way of working

Global Bank with Call Centres in Australia

- The successful implementation of 2011-12 business initiatives may be compromised because of the skill base of CSOs
- The lack of confidence of CSOs in their ability to sell the new or changed products, in particular the insurance products, will have a significant impact on all matrixes, in particular the sale matrix
- The “tool box” of CSOs lacks depth and as a result the CSOs do not have the flexibility required to adapt to the myriad of customer situations and to explore the options available to the customer
- CSOs lack ownership of the customer call and the customer does not feel inspired to commit
- Sales happened in an unplanned/non-strategic manner; this lack of focus was not sustainable in the new environment and would limit the ability of the team to achieve the “stretch” targets

Customer Service	Sales
<ul style="list-style-type: none"> • CSOs sound bored, uninterested; some seemed impatient with the customer • CSOs do not always indicate willingness or desire to help the member, over and above the minimal delivery of service – there were a few exceptions • Transactional process vs relationship-building • CSO does not instill confidence • Many silences occurred without explanation to the customer • Knowledge varies – CSOs often do not know <i>what</i> and <i>how</i> to respond • Empathic phrases often sound insincere 	<ul style="list-style-type: none"> • Little initiative used to generate an offer • Many “offer” opportunities missed; little or no positioning of the product • Conversion of offer to sale occurred predominantly when offer requested by the customer • Most CSOs perceive themselves as customer service focused and not salespeople • Calls lack structure • Little demonstration of listening • CSOs do not have problem resolution attitude or approach • Lack of clarity in understanding of member’s query – limited probing

KONA Solution and Actions

- Implemented the KONA ACTC process
- 'Double Jacking' telephone calls listening in to measure quality of conversations - (see matrix above)
- Developed several training modules for Customer Service Officers (CSOs) and Team Leaders including....

Customer Service Officers (CSOs)

Module 1: Understanding Sales

- The business case
- Your role
- The sales process

Module 2: Generating the Offer

- Listening
- Gathering Information
- Delivering the Offer

Module 3: Converting the Sale

- Managing Objections
- Negotiating with the customer
- Delivering “bad news” to the customer

Module 4: “Call Management”

- The Funnel Process
- Leading, Guiding and Directing the call
- Navigating the Funnel

Module 5: Individual Coaching

- Listening to calls
- Self-assessment using Assessment Tool
- Coaching
- Individual Development Plan

Team Leaders - Managers as Coaches

Module 1: Your role as Coach

(Deliver prior to Modules 1&2 CSO training and immediately after)

Pre:

- Expectations, challenges
- Coaching vs Mentoring
- Your team
- Listening, feedback

Post:

- Review of CSO module
- Assessment tool
- Listening
- Feedback to coaches using assessment tool

Module 2: Group Coaching

- Situational Leadership
- Running a coaching session
- Practice/observation
- Calibration

Module 3: Listening Sessions

- Listening Sessions
- Calibration

Module 4: One on One Coaching

- Key Skills
- Running a one-on –one session
- Joint Listening session
- Practice/Observation
- Individual development plans

Module 5: Listening

- Listening Sessions
- Calibration
- Development plans progress

Outcomes

- CSat (Customer Satisfaction) scores increased by 12%
- Wider range of products being sold off the 'palette'
- Established a long term training program that is now being rolled out internally
- Program a crucial part of induction

International Organisation Based in Hong Kong

Client's Situation

- No efficient performance management processes
- No management training in place
- Declining staff motivation and morale
- High staff turnover
- Declining conversion rates
- Increasing people management cost
- Increasing transactional costs
- Declining profit

KONA Solution and Action

- Implemented ACTC™ process
- Scoped and measured efficiencies deficits
- Consulted with Management team on how to overcome the key issues
- Developed and Executed customised training programmes
- Coached Post Training implementation

Outcomes

- Increased customer retention by 18% in 4 weeks
- Increased profit by 5%
- Reduced SG&A/COS by 10%
- Staff retention increased by 20%
- Transaction costs arrested and decreased by 3%