



Compassion, Confidence, and Customer Service Training

Recognize and nurture soft skill development to build
a better customer service rep.

BY JOSEPHINE ROSSI

Providing great customer service has always been important to business success. During the past decade, however, the rise of new technologies, rapid information sharing, and shifts in marketing mindsets have ushered in an unprecedented level of customer choice and control, regardless of industry.

Companies that can provide consistent and highly personalized customer experiences are poised to have the competitive advantage in the years ahead. Three organizations—Johns Hopkins Medicine, MTR Corporation, and Ameriprise Financial—have developed distinctively different award-winning training

programs to accomplish just that by focusing on soft skills improvement, authentic listening, and employee recognition in addition to core skills development. Here's how they did it.

Cultivating empathy

Each year, 400 customer service agents at Johns Hopkins Medicine—Patient Access handle more than 4.3 million calls, which usually are from nervous patients facing intimidating medical diagnoses. The agents are responsible for scheduling appointments, discussing insurance matters, and addressing individual concerns, yet the organization had no standardized program for insurance training and inconsistent

standards for serving patients via the phone. The result was thousands of claim denials and dissatisfied patients.

The talent management, quality, and training team saw that as an opportunity not only to improve knowledge and build a benchmark of professionalism but also to foster empathy skills among agents dealing with anxious callers. Consequently, it developed a multilayer solution that includes evaluating, coaching, and training agents, in addition to creating a monitoring tool and proprietary scoring software. The team structured classes to help employees find the answer and understand the concepts rather than just to get a question correct on a test. By empowering employees to be problem solvers, confidence is built, making them confident and professional for the patients.

MTR, a multinational railway operator based in Hong Kong, uncovered a similar demand for more caring service when customer complaints revealed the need for better communications from its 1,500 service ambassadors during challenging situations. Through a stakeholder needs assessment, L&D team members observed that improving service skills was not enough to provide caring service to passengers; a continuous learning and holistic approach was necessary to reframe old mindsets.

The company's Driving Service Excellence Programme for Customer Service Ambassadors, a four-stage initiative, strives to improve service performance through customer service-oriented training for ambassadors and their supervisors; ongoing monitoring and coaching; and continuous self-learning via text, online, and mobile channels. Moreover, the two-way coaching sessions between supervisors and ambassadors enable frontline staff to explore personalized solutions to challenges encountered on the job, instead of merely relying on one-way instruction to resolve customer problems.

When scripted customer interactions with call center associates were no longer effective at Ameriprise, the L&D team placed active listening at the heart of its adaptable learning framework. The company's 4Cs of Service Culture practice targets 400 call center associates located at four of the financial planning and advisory firm's locations. They serve both direct clients and Ameriprise's financial advisors. The design features paired role plays, individually recorded calls simulating real-world situations, advanced skill building, leader-led refreshers, and coaching.

The four Cs—connect, commit, confirm, and contribute—denote a cultural shift in what associates are to do on the job. Specifically, by connecting with clients and advisors, associates bring the customer's perspective to the forefront and emphasize care and empathy to decrease call escalations and improve satisfaction.

Fostering self-esteem

Confident employees are more efficient and provide higher-quality engagement with customers, and all three programs

found ways to raise employee self-assurance through interactive coaching, role playing, or simulation. Two L&D teams also incorporated recognition activities that focus on emphasizing positive behaviors and improvements.

Ameriprise TD team members structured coaching opportunities for associates and the leaders who provide the feedback. Leader coaching practices became a priority across the organization, and team members work closely with leaders to support and prepare them to effectively coach and develop associates within the 4Cs framework.

At Johns Hopkins, the team created a quality process delivered by quality partners who are referred to as "QPs." The leadership team chose a partner approach to quality assurance, with the QPs functioning as subject matter experts in a coaching role as opposed to the traditional call-center auditor. They evaluate calls and give objective feedback directly to the agents. Regular personalized meetings with QPs instill confidence in agents, which boosts performance levels. In addition, the QPs and leaders reward agents with star cards to acknowledge a job well done, such as an exceptional call or progress on patient service goals.

An ongoing performance monitoring mechanism at MTR also provides timely feedback regarding service ambassadors' service performance. "Good" performers receive quarterly noncash awards as a recognition of their excellent performance, while staff with performance below service standards receive field coaching support to help them improve their service quality.

Reaping the results

The move to customer-centric practices yielded positive results for all three organizations. In general, they have experienced increases in professionalism, quality, and performance among their customer service reps. They have enhanced conflict resolution solutions and experience fewer call escalations. Most importantly, satisfaction ratings among customers have improved dramatically.

The programs also have led to less direct, but equally meaningful, behavioral changes and lessons learned. For example, at Johns Hopkins, the softer approach to evaluations has fostered a cooperative mindset toward performance assessment. Agents view QPs as partners and colleagues rather than auditors. The team at MTR made a realization: Interactive coaching and mentoring can enhance employees' competence and reinforce learning at the same time.

The companies likewise report tangible benefits to their bottom lines in terms of staff hours saved by addressing fewer complaints, double-digit returns on investment, and more customers served, which generates greater revenue for the organizations.

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