

## January 2021 White Paper



**INVESTING IN YOUR CONTACT CENTER'S  
FRONTLINE LEADERS &  
SUPERVISORS**

## INTRODUCTION

While we like to believe that the Executive team in our contact centers man the wheelhouse, steering the direction of customer support, sales, retention and loyalty, the truth is that the success or failure of the customer and employee experience lies firmly in the hands of your frontline managers. These individuals are required to lead and motivate their teams while boosting their division's performance to reach goals. Unlike the executive team, the frontline supervisors and managers spend a great deal of time with customer-facing staff and are largely responsible for customer outcomes and relationships.

The role of a frontline supervisor or manager is a demanding one and must not be taken lightly. Their responsibilities include but are not limited to employee motivation, team building, agent engagement, ongoing coaching and mentoring, provision of rewards and recognition as well as disciplinary actions, key performance indicator (KPI) management, and communication. Due to these leaders' overwhelming influence on performance metrics and the overall customer experience, it is important for every company to properly invest much-needed time, money, and resources on their development.

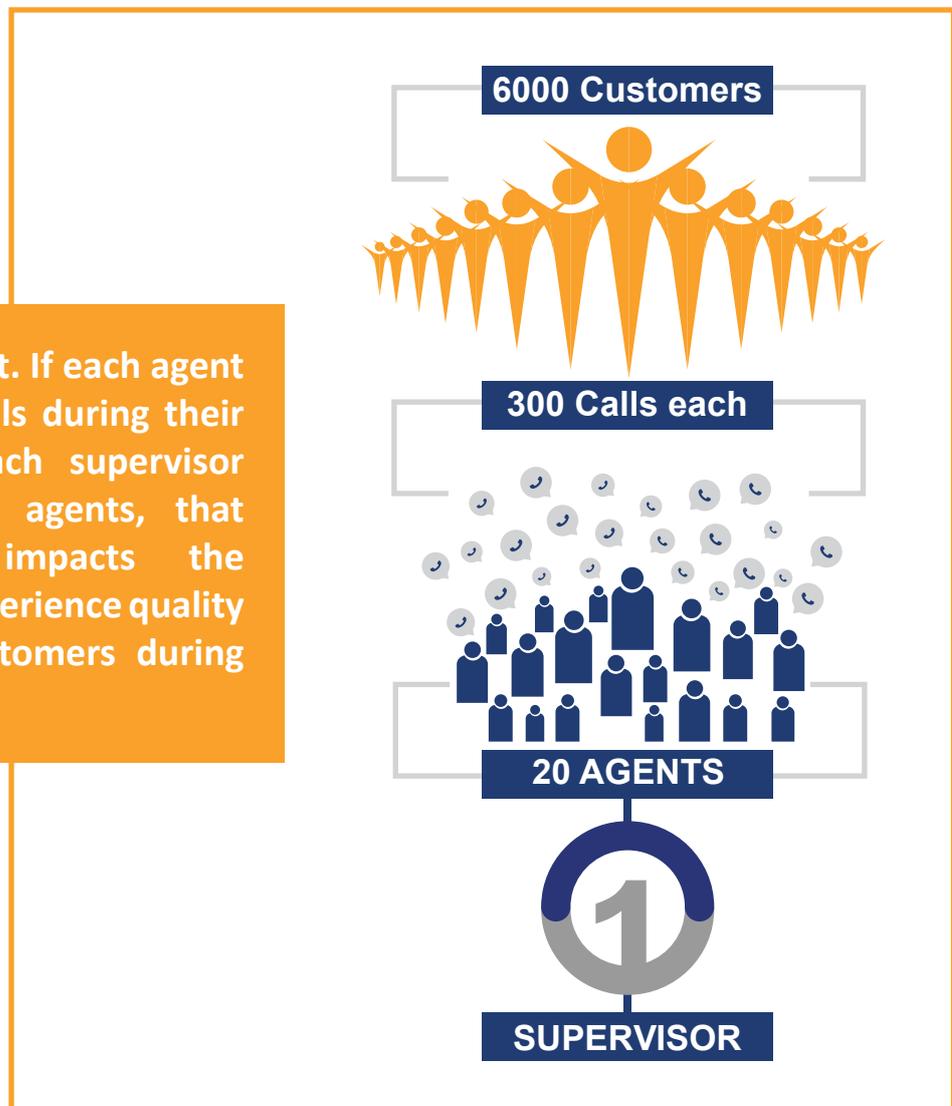
The purpose of this whitepaper is to make the case for investing in your frontline management team while also providing some effective practices you can start implementing today. Follow along with **CH Consulting Group and Cardiff Martech** as we explore significant topics such as the importance of frontline leadership development, where to find effective frontline leaders, and how to invest in your frontline leadership team.



## WHY SHOULD YOU INVEST IN YOUR FRONTLINE LEADERS?

Investing in your employees is one of the smartest business decisions you can make. While many tend to think about developing and training their frontline staff, this means that the frontline supervisors and managers are often put on the back burner. This is a huge mistake considering that the effect that your frontline supervisors has on the overall customer experience is undeniable.

Think about it. If each agent takes 300 calls during their shift and each supervisor manages 20 agents, that supervisor impacts the customer experience quality of 6,000 customers during ONE shift!



We can go on and on about the benefits of investing in your frontline supervisors and managers, but we wanted to take a slightly different approach. Let's look at the NEGATIVE effects of NOT investing in your frontline leadership:

- **Increase in employee turnover rates and decrease in employee morale** – when your supervisors don't feel supported and valued in their role, they are more likely to quit. In addition, they may carry poor attitudes due to lack of support which will translate to poor management of your frontline staff causing your staff to also be more likely to look for another job. High turnover rates mean your company will need to spend more time and money on recruiting, training, and retaining new staff.
- **Decreased revenue, profitability, and productivity** – when your supervisors are not engaged and motivated, neither is your staff! This can result in poor customer experiences which can lead to poor sales, lost customer loyalty, and tarnished brand reputation.
- **Increase in company operating costs** – when your supervisors are not adequately managing employee performance, this can cost your company big time! You will be more likely to have inflated staffing costs due to decreased productivity and inefficient processes.

We hope we didn't scare you off just yet, but let's be honest: inadequate frontline leadership is downright terrifying for your business! The good news is that we have prepared for you a practical, no-nonsense guide to investing in your frontline leadership. Keep reading!

## WHERE TO FIND EFFECTIVE FRONTLINE LEADERS?

The quality of your frontline supervisors is the single biggest factor in your contact center's long-term success!



In fact, a recent study from Gallup (2015) found that the manager or team leader alone accounts for 70% of the variance in team engagement.

Knowing this, many organizations have understandably adopted a “promote from within” model to recruit frontline supervisors and managers. This model makes sense for many organizations since it leverages employees within the company that are often seen as top performers and model employees. It often saves the company time and money that would have been spent recruiting and vetting a pool of unknown candidates. This model can also help to boost staff morale and allows staff to envision an upward trajectory of company mobility which could lead to more satisfied and productive employees.



**Let's take a look at what the frontline supervisor role looks like and a few basic requirements and skills of the ideal frontline supervisor:**

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- **Who are they?**

- o Frontline Supervisors help train and motivate call center and customer experience representatives as they answer questions, handle complaints, and provide support for clients. They assist in hiring and training employees, monitoring representative progress, and coaching them to cultivate the knowledge and skills to provide excellent service to customers.

- **What education do they have?**

- o Frontline Supervisor Requirements:
  - High School Diploma or equivalent, but more education, especially in management, is preferred.
  - Call center, customer service, or supervisory experience may be required.

- **What is their skill level to lead?**

- Proficiency with technology, especially computers, software applications, and phone systems.
  - Exceptional verbal and written communication skills.
  - Strong understanding of company products, policies, and services.
  - Ability to coach, train, and motivate employees and evaluate their performance.
  - Excellent problem solving, leadership, and customer service skills.
  - Analytical, efficient, and thorough.
  - Ability to remain calm and courteous under pressure and navigate tense situations, especially during busy hours.
- o Top 5 Skills
    - Critical Thinking
    - Decision Making & Reasoning
    - Problem Solving
    - Communication, specifically Coaching and Emotional Intelligence
    - Ability to Motivate, Inspire and Influence

Although the “promote from within” model has its advantages, it is not a one-and-done solution! Many organizations will hire top performers from within and believe they can magically become great leaders and coaches.

**News flash: Just because you have an agent that performs well doesn't mean they will automatically be a great leader!**

Great leaders need investment in terms of time, money, resources and support. The promote from within model works extremely well for just about any organization when there is proper training and coaching in place. Invest in your frontline leaders through proper training, onboarding, and ongoing development. Check out the next few sections to see how you can invest in your frontline leadership today for a brighter tomorrow!

# INVESTING IN FRONTLINE LEADERSHIP, PART 1

## How to Get Started

Do you want your frontline leaders to succeed? Then you need to set them up for success! Many frontline supervisors and managers find that they lack training and support from the executive team, which can be hugely detrimental to the customer and employee experience as a whole. We understand the intricacies of how to develop the “A-Team” when it comes to your frontline leaders, and have channeled it into an easy-to-digest checklist. See below for our checklist to improve the bench strength of your frontline supervisors. From selection to on-boarding to ongoing development, you need to invest in every step of the journey for your frontline leaders:

1. **Talent acquisition** - hire the right people, don't just promote your top agents. Develop the right interview questions to ensure the candidate understands how to create a high performing team and the significance of coaching for success.
2. **Transition Supervisor's role from “Boss” to “Coach”** – this helps to put your supervisors in the mindset that their role is to guide, coach, and mold the agents rather than simply being an authoritative figure.
3. **Develop a 60-day new Supervisor on-boarding plan**- an on-boarding plan will ensure the new Supervisor is set up for success in their first 60 days. If you don't have any new supervisors to on-board but have never officially on-boarded your existing supervisors, it would still be beneficial for you to create and deploy an on-boarding plan for your existing supervisors to ensure you are on the same page in terms of role expectations, goals, company vision, etc.
4. **Supervisor Training and Development plan**- Similar to how you would develop training and development plans for your agents, you must also create an effective plan for your frontline supervisors. An effective training and development plan for your frontline leaders will help cultivate powerful supervisors and managers that your organization needs to lead your customer-facing staff. This will help your organization create high-performing teams, optimize performance management, and foster a customer-focused culture.
5. **Develop key performance metrics for your Supervisors**—your frontline supervisors should have goals and metrics that they are responsible for meeting. These metrics will help you determine the effectiveness of your frontline supervisors and identify areas of opportunity.

6. **Develop career pathing** – this is essential for your frontline supervisors to be able to clearly visualize the education, training, and skills they will need to move forward in their careers within your organization.
7. **Talent assessment of your frontline leadership** – leverage this assessment to quantify your overall leadership bench strength and know how much leadership lift and drag you have. This can help you identify your frontline leaders' areas of strength and weakness so that you may develop them accordingly.

## INVESTING IN FRONTLINE LEADERSHIP, PART 2

### How to Improve Bench Strength of Your Frontline Leaders

Now that you have a functional checklist to get you started, let's take a look at some of the common challenges faced by frontline supervisors:

- Lack of training and support
- Poor performance management
- Little to no supervisor-level coaching
- Heavy focus on short-term priorities with little to no vision on long-term priorities such as staff development

These challenges can leave your staff feeling unsupported and unprepared, which has a huge impact on your frontline staff. In turn, this will further impact the service that your frontline staff provides your customers. Frontline supervisors and managers may feel pressure from higher management, but do not feel like they have the support they need to meet company KPIs or meet the needs of the agents they manage. In order to move forward, your organization must address these challenges and find solutions that will empower your frontline supervisors.

See below for some best practice solutions you can implement to address these challenges:

### Training for Success

As previously mentioned, many newly promoted frontline supervisors often receive little to no supervisor training. Although they may be a top-performing agent and stellar employee, that does not always translate to the effective leadership that you need in your contact center. Take a step back and look critically at the supervisor training you have in place.

*Is your supervisor's role and responsibilities clearly documented and communicated to your supervisors?*

*Does your training program develop and test your supervisors' knowledge in key areas such as performance management and employee relationships?*

*Are your supervisors able to demonstrate adequate communication skills needed to motivate, inspire, and engage your frontline staff?*

These are just few of many questions you must consider when it comes to training your frontline leaders. In developing or revising your supervisor training program, make sure consider the following components:

- Clear, concise job description complete with job responsibilities that every supervisor must sign off on.
- Training courses should be interactive and structured around topics that will allow supervisors to develop critical supervisory skills specific to your organization such as change management, conflict resolution, relationship building, accountability, and motivation. A few examples include:
- Communication skills development – can include role-playing exercises for common scenarios in the workplace.
- Delegation and accountability – your supervisors simply cannot do it all! They must be trained on what tasks can be delegated and how/who to delegate to appropriately. They must also understand that delegation does not mean they are free from the consequence of their delegation.
- Train how to use tools effectively! What good are your tools if your staff aren't using them to their fullest potential?
- Establish clear learning objectives and develop the proper assessment tools to gauge the effectiveness of your training program and the quality of your supervisors-in-training.
- Create ongoing training programs that seek to reinforce core supervisor competencies and further develop your supervisors.

Ultimately, when your supervisors are able to see the amount of time and effort you put into training them and professionally developing them, the more likely they are to remain committed to your company. It can also contribute positively to their productivity:



In a study of more than 3,100 U.S. workplaces, the National Center on the Educational Quality of the Workforce (EQW) found that when employers increased their employees' professional training by an average of 10 percent, employee productivity increased by an average of 8.6 percent.

## COACHING FOR SUCCESS

### Customer Service Starts With Coaching the Coaches

Many times when we think about Call Center Quality Assurance, we focus our attention on the front line agents. We also tend to focus most of the training & coaching in a customer service organization on customer service reps (CSRs). Front line agents can only perform to the level of quality they are trained to know.

What we tend not to spend as much time on is the training of supervisors and managers. Supervisors and managers themselves need to be instructed on coaching & training best practices and techniques. Training call center supervisors and managers ensures that quality flows through the organization, ultimately benefiting the customer (which translates into brand benefits – the ultimate objective of customer service).

You can choose to outsource your supervisor coaching to an outside organization or you can develop one internally. Regardless of whether or not you decide to outsource, your supervisor coaching program should include the following components:

- Provide a safe space for supervisors to be able to voice concerns, challenges, and issues they are facing.
- Appoint a qualified supervisor coach that will help empower supervisors to think critically and apply sound decision-making skills to everyday situations, but will not allow supervisors to become dependent on them.
- Have clearly documented coaching processes such as objective, standardized coaching scorecards.

- Establish core competencies that supervisors are evaluated and coached on. When supervisors are found to be lacking in a specific core competency or competencies, deploy a corrective action plan to help them obtain the adequate skills they need.
- Go in with the mindset that you are coaching for change – this means coaching supervisors to best support their agents and have an impact on agent behavior.

## QA TOOLS FOR MANAGERS & SUPERVISORS

Monitoring, evaluating and follow-up training & coaching are the tools at which managers and supervisors need to excel in order to ensure that their organization:

- Implements clear performance standards
- Improves calibrations & scoring among Evaluators
- Improves quality, sales and retention performance

There are numerous other benefits for your company, as well. High performing supervisors & managers tend to have much greater confidence during coaching sessions as they are equipped to provide more consistent and effective feedback. At the same time, CSRs are more confident that the Company is utilizing fair measurements, and will tend to have more program “buy-in.”

Without proper monitoring & evaluating by supervisors, how:

- Will you know if newly-trained skills are being used on the phones?
- Will you be able to measure if you are making progress?
- Can you provide consistent feedback to your employees?
- Do you challenge employees to improve without a basis from which to set goals?

With that said, it is important to provide your frontline supervisors with the tools they need to monitor and evaluate the quality of the frontline staff:

## Getting the Right Data for Call Center Coaching

Accurate, useful data in the right hands is vital to the success of developing & mentoring your frontline employees into customer service experts. The best feedback for agents is only as good as the quality of the feedback supervisors provide.

## **Bad Data Can Do More Harm than No Data**

From a management standpoint, it is important to ensure that the right information & analytics are put in the hands of managers & supervisors, so they can properly assess agent or CSR performance, and identify growth or improvement targets. Using the wrong metrics – or poorly calibrated data – can end up doing even more harm to your call center than a lack of data.

## **Leverage Data & Scoring to Improve Call Center Training**

Successful managers and supervisors in the call center look beyond the individual agent scores to evaluate the overall execution of the call center. They know what information they need to get from the mountains of data that many call centers have, being able to gauge the importance of data and understanding what it means is a key reason to ensure call center leadership is – itself – well-trained.

Managers need to understand what, precisely, the data is telling them – and in some cases the key takeaway can relate to more than just a single agent's performance. Call center-wide trends need to be identified, and corrective actions for weaknesses may include group coaching or training, rather than single-agent-coaching.

Remember, the best call center training in the world – even with the best trainer – is useless if the techniques that are taught are not accepted & reinforced by supervisors and managers on a daily basis.

## **Automation Technology**

Aside from quality assurance tools and technology, it is also important to provide your frontline supervisors with technology that makes their job easier so that they can focus on core tasks such as coaching your frontline staff and developing high-performance teams. In the unprecedented times we live in, due to COVID-19, a work-from-home workforce has become the norm for many organizations. As a result, your technology stack must include platforms that accommodate this shift.

Talk to your frontline supervisors and find out which areas may be slowing them down in the form of manual or repetitive tasks that can be easily automated using the proper technology. Automation technology can help to make your frontline supervisors more efficient and can have an enormous impact on your customer experience as a whole.

- How can we support supervisors with adequate technology?
  - o Provide supervisors with technology that support work-from-home functions and provide effectiveness despite not having a brick-and-mortar location at the moment
  - o Engaging with New-Hires from Day 1
  - o Leveraging QA Insights for Real-time Performance Management
  - o Improving the Coach-to-Agent Connection
  - o Artificial intelligence integrated into customer interactions
  - o Digital transformation
  - o Better contact center analytics
  - o Omnichannel communications for all
  - o Widespread adoption of cloud communications in call centers
  - o More robust customer satisfaction measurements
  - o More remote call center agents
  - o Continued emphasis on self-serve documentation
  - o Two-way social media conversations
- Communications/Messaging tech
- Quality Assurance
- Reporting & Analytics

When you invest in automation technology for your supervisors, you can save money and increase efficiencies by reducing the amount of time needed to manually evaluate employee performance, improve supervisor and employee workflows, increase staff participation, and improve the bench strength of your current team. Sounds like a win-win for everyone!

## LISTEN TO YOUR FRONTLINE LEADERS!



Last, but not least, learn to listen to your frontline leaders! This doesn't mean ask them for their feedback at the end of their training, and then never again. This means creating a consistent process where you regularly solicit the feedback of your frontline leadership whether it be through quarterly email surveys or through their regularly scheduled supervisor-level coaching sessions. Your frontline supervisors have their "finger on the pulse" and can give you direct, honest feedback on inefficient processes, negative trends they have been noticing, etc. If your frontline supervisors are saying that they find themselves inundated with administrative tasks that are keeping them from coaching and developing your frontline staff, listen to them! Take their feedback seriously and review their daily tasks to see how you can best support them so that they can focus on their most important responsibilities: staff development and performance management.

### SUMMARY

Looking back over the last twenty-five years leading contact centers, we can say without a shadow of doubt that the frontline supervisors are the "linchpin" to an effective and efficient operation. So, why is it that these mission critical frontline leaders are the largest group of people that have consistently received the least amount of investment in training and development? Fortunately, you now have this guide to help you get started on revitalizing your frontline leadership so that you can get the results you desire. Hopefully, by now, you

understand the importance of your frontline leadership and the impact they have on your frontline staff and the customer experience that your organization delivers. In conclusion, here are a few key takeaways we would like to highlight from this whitepaper:

- Your frontline leadership has a direct and undeniable impact on the customer experience – make sure you are regularly investing in this essential team!
- Frontline leaders often feel unsupported, ill-equipped, and inadequately trained to perform their duties.
- Your frontline leadership should be spending a majority of their time coaching and developing your frontline staff.
- Supervisor-level coaching is just as important as agent-level coaching.
- Ensure you are properly onboarding your frontline leaders and providing effective, ongoing training.
- Ensure that your frontline leaders are equipped with the tools and resources (ex. QA, work-from-home, and automation technology) they need to efficiently fulfill their duties.

If you need help getting started with investing in your frontline leadership, CH Consulting Group and Cardiff Martech can help! Combined, we have hundreds of years of experience in optimizing operational and technical systems and processes that impact an organization's overall customer experience, profitability, and bottom line. Contact us today to get started with a free consultation to see how we can support your organization's growth!

## ABOUT



CH Consulting Group is comprised of thought leaders in the Contact Center industry with more than 250 years of collective industry experience in enhancing the customer experience for the evolving omni-channel contact center. The team is led by Christa Heibel, who provides over 25 years of industry experience and known widely as an influencer and C-suite business growth and strategy expert. The CH Consulting Group team has been on both sides of the coin: on one side, they have been owner/operators or internal contact center executives, on the other side they have delivered results as BPO

Contact Center solution providers. CHCG’s decades of experience also provide them with a key differentiator in the consulting space – that is their invaluable industry relationships. They recognize the importance of relationships which is evident through our numerous strategic partnerships and ongoing clients that generate 80% of their new business.

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## ABOUT



Cardiff Martech, LLC is a privately held consulting company that is based in Solana Beach, CA. The company principals include Michele Crocker and Christopher Crocker. Our principals have wide ranging experience as senior executives in both publicly held and privately held corporations. Areas of expertise include:

Customer Service	Human Capital	Operations
Call Center Assessments Customer Service quality	Talent Assessments	Technology deployment
Improvement Omni Channel Support	Organizational Development Coaching, Training & Development Restructuring Metrics and Accountability	Scaling Startups Real estate and facilities