

Bank of Oklahoma realized an immediate increase in referrals and new deposit accounts due to the implementation of the Click2Coach system in the call center.

Bank of Oklahoma Financial Corporation Knew That Agent Coaching Was Essential

The Bank selected the Click2Coach® integrated monitoring, coaching, and eLearning system from Envision.

To ensure quality customer service and expand customer relationship, they knew their approach to monitoring calls and coaching could be improved. So in the fall of 2000, following an extensive investigation of vendor products. At that time this was the bank's situation in a nutshell:

- Customer Service Representatives (CSR's) were handling 89,000 calls per month
- CSRs were averaging a talk time of 155 seconds per call
- CSRs were idle an average of 77 seconds between each call
- CSRs were averaging 15.17 calls handled per hour
- The service CSRs were referring approximately one call per 1,000 to the sales CSRs
- The sales CSRs were converting almost 4 calls per 1,000 into a new deposit account
- The supervisors were spending 30 hours per month monitoring and evaluating calls



Results

- A 9% increase in calls handled since Click2Coach was implemented
- A 388% return on investment in its first year, paying back the initial investment in less than 3 months
- Productivity increase by 13%
- CSRs are handling 17.26 calls per login hour, approximately 2 more calls per hour than were handled before

Industry

- Financial

After the Click2Coach System the results were immediate

Along with the installation of Click2Coach in 2001, Bank of Oklahoma changed performance goals to place a heavier emphasis on up-sell and cross-sell referrals by the customer service group and CSR availability (time spent logged into the system and ready to take calls).

Supervisors monitored and coached, as agents strived to meet these new goals. The end result of this training was that the Bank of Oklahoma realized an immediate increase in referrals and new deposit accounts due to the implementation of the Click2Coach system in the call center.

E-Learning also played a huge role in meeting the performance goals. One of the first eLearning vignettes developed was a refresher course on handling IRS 1099 calls. Every January, Bank of Oklahoma had required each CSR to attend a 30-minute refresher training class. Now they get their refresher training via a nine-minute eLearning session at their desktop. By reducing the amount of CSR time to take the training, Bank of Oklahoma created enough capacity to handle an additional 412 calls.

Delivering coaching, monitoring feedback, and eLearning to CSRs at their desktop in “bite-size” learning vignettes, during periods of low call volume, is a very effective way to enable CSRs to gain, reinforce, and maintain the knowledge and skills necessary to improve their performance.

Setting clear performance goals, identifying the skills and behaviors needed to meet these goals, and coaching to meet these goals works, when coupled with integrated CSR monitoring, coaching, and eLearning systems such as the Click2Coach System. Over a relatively short period of time, the new-hires raised the performance bar, and their results speak for themselves.

envision®

901 5th Ave, Suite 3300, Seattle | 206.225.0800 | envisioninc.com

SUCCESS STORY

Envision—Contact Center Performance Assured.

Envision helps companies better align and integrate the people, processes and technologies within the contact center to drive exceptional customer service. Our belief is that continuous agent improvement helps maximize every contact with customers, which ultimately drives increased contact center and enterprise performance. Envision Centricity is a complete Workforce Optimization suite to aggregate, monitor and analyze data and performance at the agent, contact center and enterprise levels. It is comprised of multiple applications including Envision Workforce Management™ for scheduling, forecasting and staffing, with applications for quality monitoring, identity protection and compliance, and analytics; and the industry-renowned Envision Click2Coach® for fully integrated quality monitoring and management, e-learning, automated coaching, robust analytics and performance management capabilities. Visit www.envisioninc.com, email info@envisioninc.com or call 206.225.0800 ext. 500 for more information.