

Procedure *Flow*

CREATE  
PROCESSES  
AGENTS WILL  
ACTUALLY USE

## INTRODUCTION

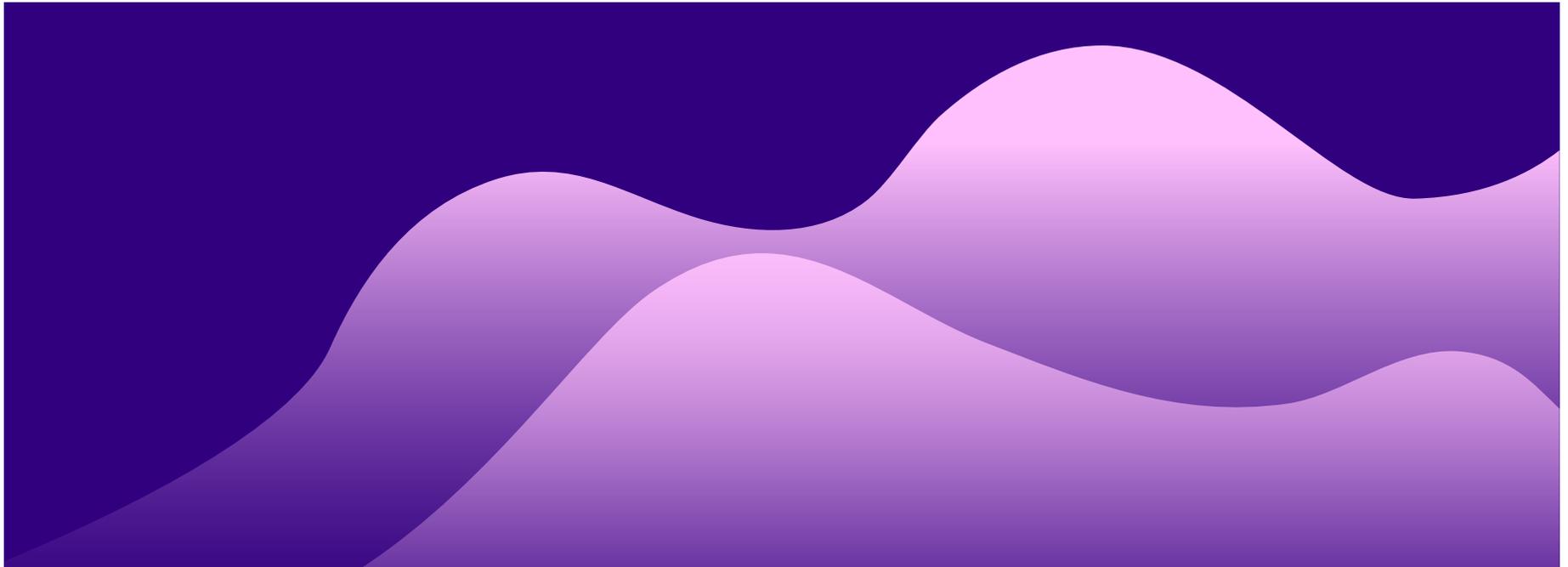
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In a contact center, quality and consistency are critical to delivering a great customer experience, and having the right processes in place is one of the driving forces behind this. When every agent is working with the same information and following the same steps, your customers can expect the same quality of service with every single interaction. But many contact centers struggle with creating and maintaining their processes, and getting their agents to actually use them. This drives inconsistency among agents, frustration among team leads and supervisors, and makes it nearly impossible to see where your processes can be improved.

This ebook will help you alleviate those frustrations and put a clear strategy in place for process transformation.

You'll learn:

- Why employees aren't following your processes,
- The impact this has on your business,
- How to get started re-vamping your processes,
- The 5 steps to creating processes that employees will actually use, and
- Some important things to keep in mind when creating and maintaining processes.



## THE UPHILL BATTLE OF PROCESS CREATION



**Y**ou've worked tirelessly for weeks, spent countless hours, and worked with multiple teams to document your processes. You've created a beautiful library, showed it off to your team, and told them to start using it. Some of your agents will begin to follow them, and for a while everything seems to be going well.

Then a few days go by, and then weeks and months. Your business changes fast and before you know it, many of those processes are already out of date. As multiple people start trying to update those processes, multiple versions of the same document appear, and no one knows which one they should be using. Then, as your document repository grows, information becomes harder to

find, creating confusion for your team. Eventually few, or possibly none, of your agents are using the processes you worked so hard to create.

Does this sound familiar? This is a very common story among not just contact centers, but all types of organizations. Documenting processes is challenging if you don't take the right approach.

What do we mean when we say "process"? The formal definition of the word process is "a series of actions that you take in order to achieve a result."<sup>(1)</sup>

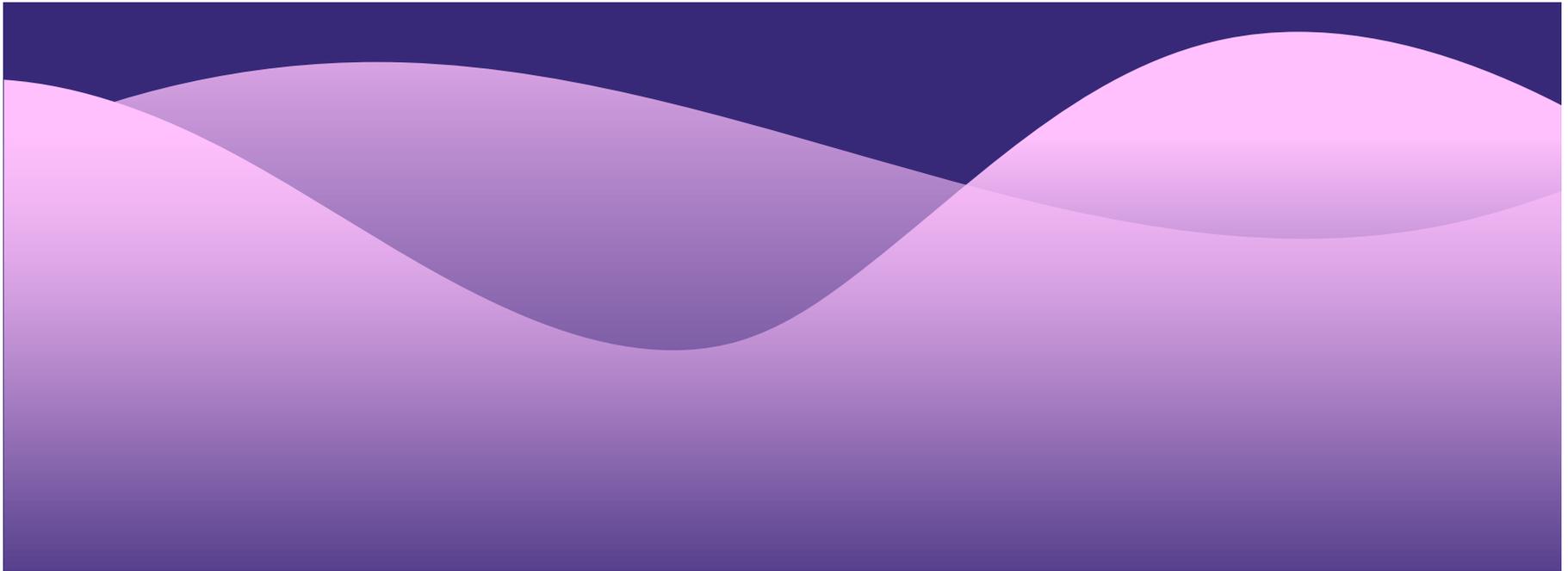
*The formal definition of the word process is  
"a series of actions that you take in order to  
achieve a result." (1)*

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In the case of a contact center, a process is the series of actions agents need to take to help a customer. A very simplified version could look something like this:

1. Greeting: Hello my name is Joe, thanks for calling XYZ company. How can I help you today?
2. Authentication: Verify the info of who you're speaking with for security reasons.
3. Find the driver of the call: Learn why the customer is calling.
4. Empathy: "I'm so sorry you're having this problem today, I'm going to do everything I can to resolve this."
5. Troubleshooting: Resolve the customer's issue.
6. Recap: State why they called, what the problem was, how you resolved the issue, and check to see if they need help with anything else.
7. Branding the call: Thank you for calling XYZ company, we hope you have a great day!





**A**gents often have their own unique strategy to resolve customer inquiries. One agent may be able to resolve a particular customer inquiry in 5 minutes, while a different agent may need 17 minutes to resolve

The reasons agents don't follow processes vary greatly depending on the nature of the business, but there are a few common factors that are seen across multiple industries:

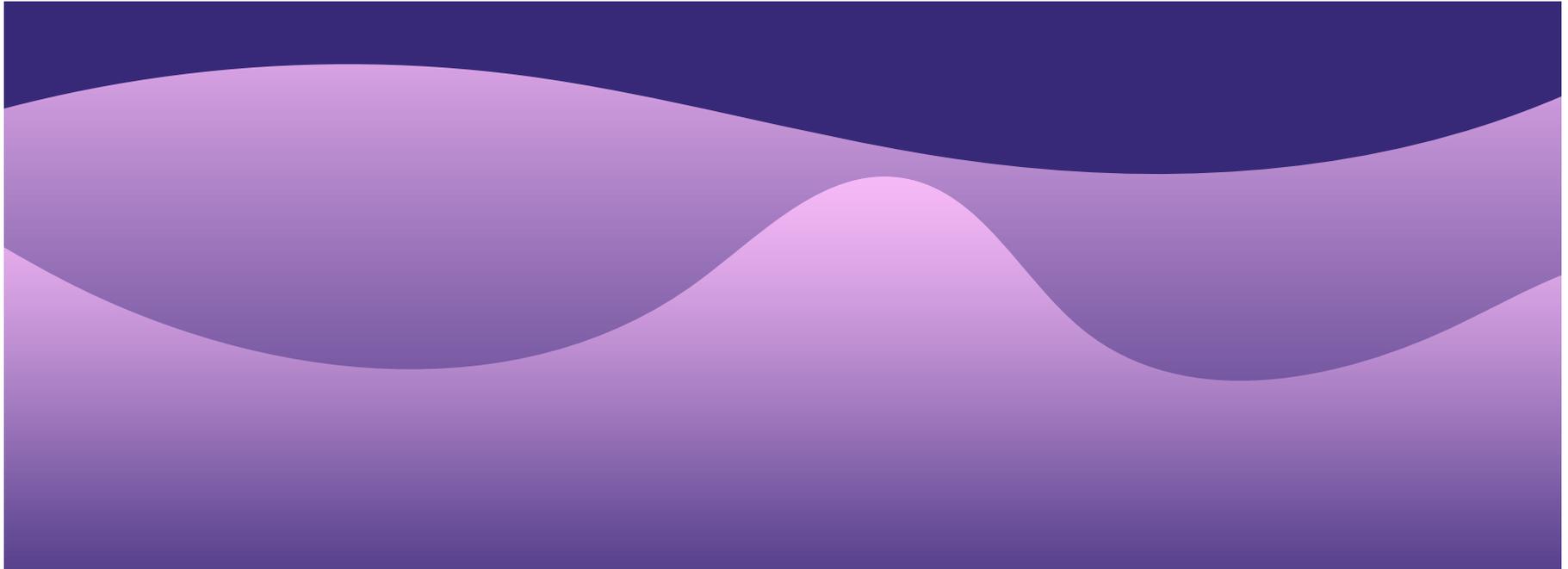
## WHY DON'T EMPLOYEES FOLLOW PROCESSES?



the same issue. These differences in processes create inconsistent customer experiences, and have a huge impact on your contact center's metrics.

**Can't find them.** One of the most common reasons employees don't follow processes is simply because they can't find them. Whether, they're stored in an obscure location, spread across multiple sources, or buried amongst other documents, no one can follow a process they can't find.

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**Inaccurate or outdated.** Employees, especially ones who have been around for a few years, know when a process is inaccurate or out of date. If employees know they cannot trust your processes, they will quickly do away with them.

**Hard to follow.** Not all processes are simple and straightforward. In fact, the more complicated the process, the more likely it is to be documented. If your processes are complex, detailed and difficult

to follow, employees will find their own way of doing things, trying to find shortcuts or a simpler way to achieve the same result.

**Dry and/or boring.** A process could have all the right information, be up-to-date and easy to follow, but if it takes too long to read or is too text heavy, employees still won't follow it. Because who has time to read long paragraphs of text when they're on the phone trying to help a customer?

## THE IMPACT OF NOT FOLLOWING COMPANY PROCESSES

56% of customers think that getting consistent and accurate information from agents is a sign of a great customer service experience.



**Inconsistent customer service.** Every type of customer scenario should have a specific process associated with it. If this process isn't documented, or isn't used by your agents, your customers receive a different level of service depending on the agent they're speaking with. This jeopardizes a company's ability to retain customers and acquire new ones.

*54% of customers would consider switching to a competitor after a bad service experience. (3)*

**Increased errors.** When processes aren't documented, employees find their own way of

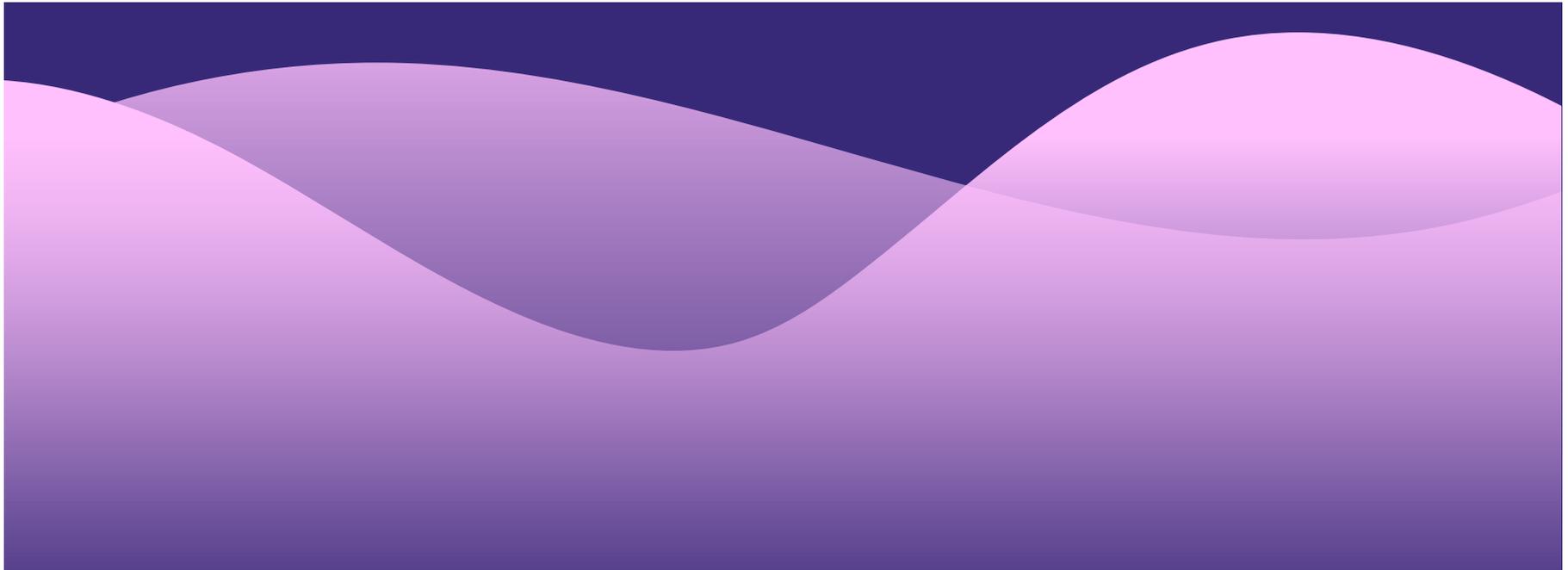
doing things. This leads to important steps getting skipped, and mistakes having to be corrected later on.

*Over 1 in 4 customers complain that the information they receive from agents is inaccurate or inconsistent. (2)*

**Higher costs.** The implications listed above all; have a direct impact on your bottom line. These costs come in the form of longer AHT, longer hold times, lost customers, increased escalations, etc. They add up over time, and if not addressed can have a major impact on growth.

HOW TO CREATE PROCESSES AGENTS WILL ACTUALLY USE





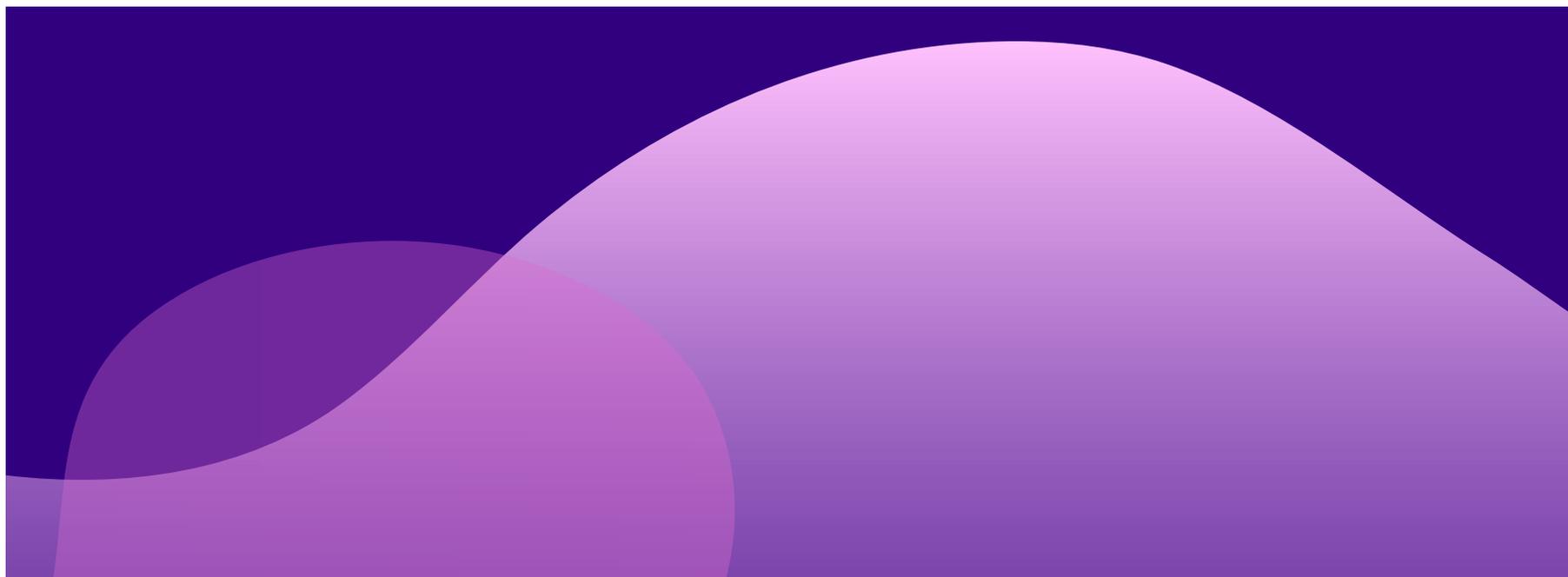
## START WITH THE END IN MIND



**W**hat are the goals you're trying to achieve? It's critical that you know what your objectives are, and have at least one metric you can use to help measure success. Contact centers that are looking to improve their processes usually aim to:

- Reduce errors
- Shorten AHT
- Improve first contact resolution
- Reduce agent effort
- Improve consistency
- Increase agent satisfaction
- Improve productivity/efficiency
- Improve CSAT/NPS

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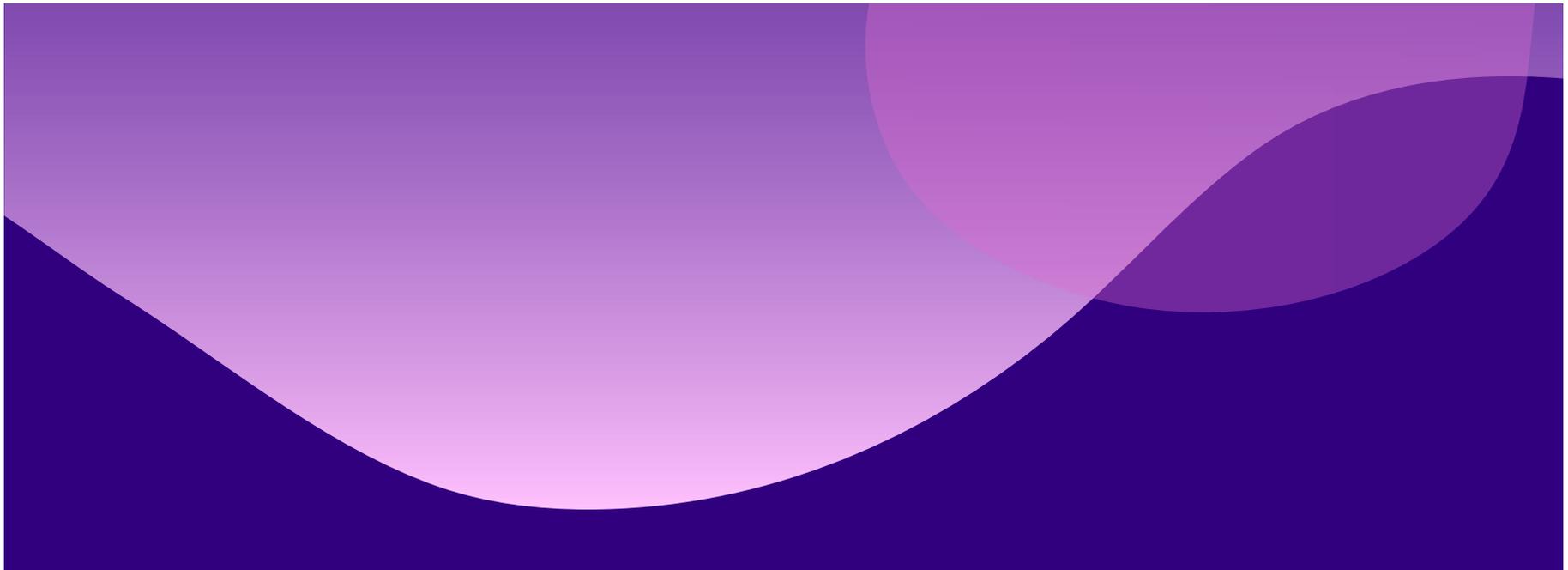
**K**eeping that end vision in mind, think about what you want your processes to look like, and how you envision your agents using them. Each contact center has unique needs, so make sure you're tailoring your processes to the specific needs of your industry, organization, and agents. Keep them simple, visual, and easy to use.

If you don't have the resources to revamp all your processes at once, we recommend starting with the ones that are causing you and your team the most pain. This could be a process that's driving a lot of errors, increasing costs, or one that is just confusing to employees.

## GET YOUR TEAM ON BOARD



Senior leadership buy-in. As with any project, it's important to get buy-in from senior leadership. These are the people who can give you the resources you need to take on a project like this, and help you when you hit a road block. To help get buy-in, create a sense of urgency by showing your leadership team the challenges you're facing with your current processes, and how those challenges are impacting the business and your customers.

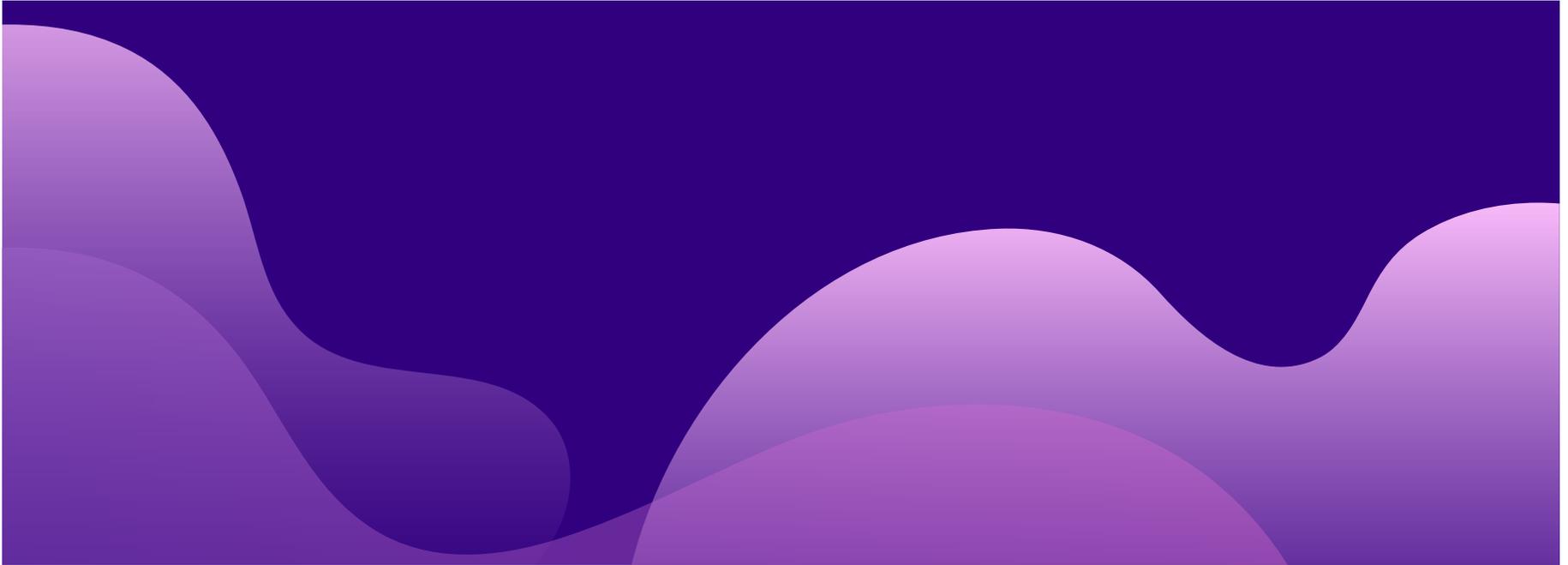


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**G**et your team involved. Supervisors, team leads, and agents all have valuable knowledge and expertise that can make your processes the best they can be. Get them involved with the project as early as possible, and leverage their subject matter expertise to create and improve your processes. After all, they are the ones actually doing the work!

Processes need owners. As your company grows, your processes will continue to grow and evolve, and this is where many organizations get lost. Create accountability by assigning every process an owner, one who is responsible for maintaining that process, ensuring that it is always accurate and up-to-date, and that it can be quickly accessed by every agent.





## 5 STEPS TO CREATE PROCESSES AGENTS WILL WANT TO USE

We've highlighted the 5 steps needed to transform your contact center's processes



## GROUP YOUR CALLS INTO 'BUCKETS'

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The first thing you'll need to do is create a high level list of call/process types for your agents. This will allow you to tackle one category of processes at a time, and see where

your processes need the most work. Here's an example of what a group of different call types/processes might look like.

Start Service

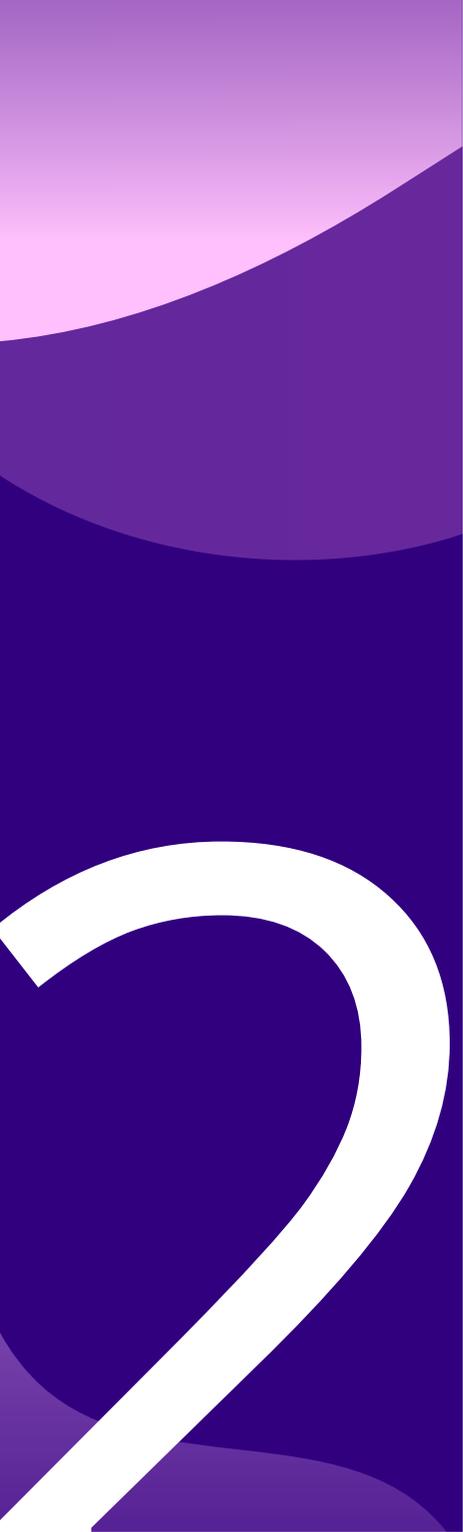
Billing Issue

Damaged Product

Customer Data  
Change

If you start to get overwhelmed with a long list of categories, try shortening the list to only high

level items, and then create sub-categories within each one.



## MATCH EXISTING DOCUMENTATION TO CALL BUCKETS

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your processes need the most work. Here's an example of what a group of different call types/processes might look like.

## TURN EXISTING DOCUMENTATION INTO SMALL, SIMPLE STEPS.

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This can be a challenging step, but it's the most important one! Most knowledge base articles or other types of documentation are presented with long paragraphs of text. This presents a challenge to agents because they

don't have time to read it when they're on the phone helping a customer. Your processes should be broken down into small, bite-size pieces of information. Here's an example of what we mean:

This paragraph of text is hard to read and refer back to quickly.

**Step 1: Greet the customer, thank them for calling East Coast Power, state your name, and get the first 10 digits of their account number.**

**Step 2: If they have their account number you can start the verification process. If they don't have their 10 digit account number, ask if they're calling to start a new service.**

**Step 3: If they're not calling to start a new service, perform an alternative customer search, and then start the verification process. If they are calling to start a new service, go to step 4.**

**Step 4: If the caller is the customer, start the residential move in process. If the caller is a landlord, start the 3rd party move process.**

These small steps convey the exact same information, but in a way that's much easier to follow:



## GIVE YOUR PROCESSES A HOME

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If you want everyone to easily find and use your processes, they'll need a place to live. Not two or three or four places, just one. This will ensure that no one gets frustrated searching multiple locations to find what they're looking for. You'll want to choose your home carefully because it's no easy task moving all of your process documentation from one platform to the next. When searching for their home, try to find one that is:

- Quick and simple to implement,
- Easy and intuitive for agents to use,
- Easy for process owners to make changes and updates, and
- Cloud-based so your information is accessible anywhere.



## TEST AND IMPROVE

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One of the best ways to see if your processes are going to be effective is to test them with the team that will be using them - your agents. But don't roll out every single process to your entire team all at once. Start with just one process or category and test it with one small group of agents.

This will highlight where your processes are strongest, and where your agents are getting stuck. But make sure it's easy for agents to provide you with their feedback; you'll want to use it to improve not only the processes you're testing, but all the remaining ones as well.

## THINGS TO KEEP IN MIND

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**Make them visual.** Have you typically enjoyed reading pages and pages of process documentation that's filled entirely with text? Well, your employees don't either. Make your processes visual with colours, images, and screenshots. This also helps to break the information down into smaller digestible pieces.

**Make them logical.** This will prevent your employees from feeling confused or overwhelmed. Make sure there's a clear path for employees to follow so they don't get lost.

**Make them easily accessible.** No one can follow processes that they can't find! Selecting a great home will ensure that your processes are easy

for employees to find, any time, any where.

**Keep them simple.** Processes that are simple to use, follow, and maintain means even your newest employees can follow them, and processes owners can easily update them.

**Avoid 'versionitis'.** If your contact center has multiple versions of the same documents and it isn't clear which ones your agents should be using, you're suffering from "versionitis". As you're updating, replacing, and maintaining your process documentation, make sure there is only ever one version of the process. This ensures consistency, eliminates confusion, and makes them easier to maintain.

## SUMMARY

To Summarize, here's your checklist for creating processes your agents will use:



Great processes are:	Great processes are not:
Easy to find, use, and maintain	Difficult to find, and time consuming to maintain
Simple and easy to follow	Complex with no logical way to follow them
Broken down into small bite size steps	Large paragraphs of text that take a long time to read
Highly visual and in a logical order	Difficult to follow
In one central location	Multiple versions of same document stored in more than one location
Always kept up-to-date and current	Filled with old or duplicate information
Continuously improving over time	Are stagnant and rarely updated
Built with agents' input and expertise	Built by process owners without consulting agents who are actually doing the work
Owned by at least one subject matter expert, or person in a leadership role	Difficult to see who the owner is, or has no owner at all

## TYING IT ALL TOGETHER

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Creating processes that are effective and well maintained is an ongoing effort, but with the right strategy in place, you'll be able to transform your team's performance, and improve the metrics that matter to you most.

At ProcedureFlow, we've helped contact centers:

- Create processes 40% faster
- Improve AHT by 12%
- Increase first call resolution by 6%
- Reduce escalations by 50%
- Cut operating costs by 11%
- Reduce training time by 75%
- Reduce errors
- Improve quality and consistency
- Reduce agent effort
- Make information easier for agents to find
- Make complex processes simple to follow
- Ensure information is always accurate and up to date

## START MAKING PROCESSES AGENTS WILL ACTUALLY USE TODAY

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Still not sure how to start? Let us help! At ProcedureFlow, we know processes inside and out. Our team of experts can take complex information, and turn it into simple and intuitive processes that your employees will actually enjoy using. [Ask our team how we can help](#), or [try our product for free!](#)

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## ABOUT PROCEDUREFLOW

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**P**rocedureFlow is a reimagined contact center knowledge base. It makes even the most complicated information easy and intuitive to create, maintain, and use. We provide every employee with the exact information they need to handle any contact scenario, making them confident in their abilities from Day 1. ProcedureFlow empowers organizations to leverage the knowledge and expertise of their top performers, and put it into the hands of every single employee. This improves both quality and consistency, and allows organizations to transform their training into “learning by doing”, creating a more motivating and engaging environment for employees.

For more information, visit [procedureflow.com](https://procedureflow.com)

## SOURCES

1. **Cambridge Dictionary**. process. Cambridge Dictionary. [Online] <https://dictionary.cambridge.org/dictionary/english/process>.
2. **Cantor, Brian**. 2018 CCW Market Study: Performance & Metrics. 2018.
3. —. 2018 CCW Market Study The Customer Experience. 2018.

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