



**FranchisePhones® | phone system in a box®**

**RETAIN CUSTOMERS  
& EMPLOYEES USING  
CLARITY'S VoIP PHONE SYSTEM**

# PERFORMANCE MONITORING TOOLS

You work hard to help your employees learn what they need to be effective. You invest a great deal of time and effort in training them how to best answer customer questions, showing them unique sales techniques that work in your business and teach best practices in properly communicating the value of your business's products and services. However, not everyone learns at the same speed or retains the same amount of information they were given during training.

Clarity's Performance Monitoring tools can help ensure your employees maximize learning effectiveness by using [Call Monitoring](#) and [Call Recording](#) features to help fine-tune your business training, we'll help you make your training and development and resulting exceptional customer service experiences a point of pride for your business.

New employees want to succeed and existing employees like to be recognized for the quality service they provide. Adding Clarity's Performance Monitoring tools such as: [Call Recording](#), [Listen-In](#), [Whisper](#), or [Join](#) helps you hear both sides of your customer conversations, in real-time or afterwards.

Every customer contact is a potential sales opportunity, a marketing opportunity, and an opportunity to strengthen a customer's faithfulness to your business. It is also an educational opportunity for your team to be praised for properly handling calls or to be coached to improve their techniques and interactions with customers and prospects.

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*Unless you can listen to both sides of a conversation, it's impossible to know whether callers are receiving the type of quality service you expect.*

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Get the Best Service with Franchise Phone System

- ▽ All callers are treated with tact, diplomacy and professionalism.
- ▽ Accurate information is being consistently relayed.
- ▽ Customer service quality is maintained and measured.
- ▽ Prospective customer questions and requests for service are being handled promptly.
- ▽ Employee's conversational tone and tactics promote trust and loyalty only a direct discussion can deliver.

For these reasons, [Call Monitoring for Call Quality](#) and Call Coaching are important tools to improve employee retention while you grow your customer base and overall business success.

# Top 4 Tools used by Managers to monitor customer conversations:



**Listen-in Mode** – Live monitoring of calls in real-time while you ‘silently’ listen-in. Reduce stress for employees because you’re not leaning over their shoulder trying to listen.

- Hear both sides of the conversation first hand.
- Deliver immediate coaching after the call.



**Whisper Mode** – Softly relay information to your employee without the caller hearing you. Allows you to assist an employee on what to say, like details on the service or give them insight about topics you know the caller cares about.



**Join Mode** – Allows you to quickly join the conversation if you or your employee think the situation merits your immediate assistance. Whether dealing with a difficult customer or quickly answering a complex question for a prospective customer. Join offers you quick access to save or secure the sale.



**Call Recording** – Recorded calls allow you to accurately understand the conversation(s) that have taken place when you’re not available to listen live. You can download calls and then share in one-on-one coaching or team training sessions.

## Customer loyalty has lasting impact to your bottom line...

- ✓ Acquiring a new customer costs more than maintaining an existing one (Grönroos, study)
- ✓ Loyal customers have a tendency to be less deal prone than non-loyal customers (Rauyruen & Miller Study)
- ✓ Loyal customers are likely to give free word-of-mouth advertising (Bowen & Shoemaker Study)
- ✓ Loyal customers have a greater tendency of purchasing products with only minor marketing efforts. (Shetty study)

Performance monitoring tools offer you unmatched insight into your customer experiences and help you create exceptional service that competitors simply can’t match.

# BENEFITS & SUCCESS

## Eight benefits that loyal customers deliver to your business:

1. **Steadier cash flow**—This creates a steadier cash flow for your business.
2. **Lower marketing and advertising costs**—saving you the marketing and advertising costs of acquiring new customers.
3. **They are more forgiving when you make mistakes**—even serious ones—especially if you have a system in place that empowers employees to correct errors on the spot. Then loyal customers become even more loyal!
4. **A loyal customer's endorsement can outperform** the most extravagant marketing efforts. Social media has proven "The word on the street" is usually more powerful than your ad in delivering new customers.

5. **Loyal employees**—usually have loyal employees who are genuinely engaged in their work, and loyal employees save you money in a variety of ways. You don't have to spend money attracting, hiring, and training new staff, and you have knowledgeable people at all levels of the organization serving customers and each other.
6. **Thriving companies with high customer and employee loyalty** are generally known to out-pace their competitors in innovation. In addition, their company cultures support continuous learning.
7. **Loyal customers understand your processes** and can offer suggestions for improvement. Their feedback can help with product/service expansion as well as operational process improvement.
8. **An increase in customer retention can boost your bottom-line profit** by 25% to 100%, depending on your fixed costs.



# BENEFITS & SUCCESS

## Customers Employees are #1 to your success.

When an employee is engaged, they are very much your biggest brand advocates. They preach the benefits of your products and are enthusiastic in dealing with the public. These employees want the organization to be successful, not just themselves. Your customer's first point of interaction with your organization is often through your employees. This first interaction is often make-or-break for first time customers, if you fail to make a good impression they may leave and never return.

High engagement among your employees improves morale, reduces turnover, and improves profitability. In fact, according to research from a [Hay Group](#) study, companies with highly engaged workers grew revenues two and a half times as much as those with low engagement levels. Contrasting this with disengaged employees, [Gallup](#) found that actively disengaged employees erode an organization's bottom line, while breaking the spirits of colleagues in the process. Within the U.S. workforce, Gallup estimates this cost to the bottom line to be more than \$300 billion in lost productivity alone.

Not only this, but employee engagement improves customer experience and leads to improved customer loyalty. Studies have found that companies with high employee engagement scores had twice the customer loyalty (repeat purchases, recommendations to friends) than companies with average employee engagement levels. (Source: Are They Really 'On the Job?')

## The cost of employee turnover may be higher than you realize!

- Estimating the cost of employee turnover seems to vary by wage and role of employee. For example, a CAP study found average costs to replace an employee are:
- 16% of annual salary for high-turnover, low-paying jobs (earning under \$30,000 a year). For example, the cost to replace a \$10/hour retail employee would be \$3,328.
- 20% of annual salary for mid-range positions (earning \$30,000 to \$50,000 a year). For example, the cost to replace a \$40k manager would be \$8,000.



# Years of statistics make a convincing case for having engaged employees. Here are the **TOP 5 REASONS** why having engaged employees is a must for your organization:

1. **Improved productivity** - Engaged employees find their job to be motivating and personally fulfilling and therefore tend to be more productive on the job than disengaged employees. Research conducted by the [Hay Group](#) found that among office workers who were actively engaged, they were **43% more productive**. This productivity frees up time for employees to devote to other tasks. This extra time could be used to search for more customers, provide service to existing customers, or help a team member complete a difficult task. The extra time could also be used to hone existing skills or develop completely new ones. If this is the case, not only is the employee more effective, but they will also be more engaged as a result
2. **When an employee is engaged, financial compensation is not their primary motivation** - Engaged employees find their work to be personally fulfilling, and feel that their position is an important part of who they are as a person. While they do expect to receive compensation, this is not what drives their efforts each day. They are motivated to improve themselves, the position they are in, and the organization as a whole.

These employees receive personal satisfaction from a job well done. Contrast this to an employee who is only working to receive a paycheck. This individual will apply no extra effort to the position and does not really care about the organization. You don't want your employees to remain employed with you just because "the money is good." With Clarity's Performance Monitoring tools, you'll quickly identify and deal with these type of individuals.

3. **Improves retention and reduces absenteeism** - When an employee is engaged, they are much more likely to remain an employee of yours for an extended period of time. Studies found that highly engaged employees were 87% less likely to leave their companies than their disengaged counterparts. (Source: [Driving performance and retention through employee engagement. Corporate Leadership Council](#)). Engaged employees miss work less than their disengaged co-workers. A Fortune 100 company saw **absenteeism drop from 8% to 4.8% and reduced turnover from 14.5% to 4.1%**. (Source: [Employee Engagement: The Key to Realizing Competitive Advantage, Development Dimensions International](#)). Reducing absenteeism means that your organization can work at full pace more often, improving your overall effectiveness and the speed with which you can accomplish tasks.
4. **Impacts profitability and increases revenue** - Having engaged employees can have direct, bottom-line impact on profitability. A study of 64 organizations revealed that **organizations with highly engaged employees achieve twice the annual net income** of organizations whose employees lag behind on engagement. (Source: [The Impact of Employee Engagement. IBM Kenexa](#)).

These findings illustrate just how big of an impact employee engagement can have on profitability and revenue. It's an easy way to increase these two metrics without having to attract more customers or cut costs in any way.

5. **Leads to customer loyalty** - Perhaps the biggest organizational benefit of employee engagement is that it can help to develop loyalty among your customers.



# ENGAGEMENT = LOYALTY

## Here are **three reasons** why having engaged employees can lead to improved customer loyalty

### 1. Engaged employees provide better customer service

Engaged employees provide top-notch customer service and aim to create an amazing experience for customers. They will truly go the extra mile for a customer, making sure that they are pleased with the products they have received and the experience they have had with your brand. These employees don't mind spending extra time with a customer and make sure that they are completely satisfied before they leave. They set realistic expectations for customers and ensure these expectations are met.

Your customers will take notice of the amazing customer service you provide, and repurchase from you as a result. In John Goodman's book, "Strategic Customer Service" he found that customers who are delighted by proactive education or superior service are **10% to 30% more loyal than customers who have not been delighted.**

### 2. Engaged employees provide a better brand experience

Engaged employees love products they are selling. In addition, they are enthusiastic, kind to customers, and willing to promote to others how amazing your company and products are. Their excitement and brand affinity will shine through in their interactions with customers. If a customer sees that an employee (a likely expert on the subject) has so much excitement for your products, they will likely make purchases from you. According to Monetate, **73% of consumers would consider purchasing from a brand again if they had a superior customer experience.**

As stated before, engaged employees are more productive than their disengaged counterparts. This improvement in productivity means that they will be able to deal with customer inquiries and complaints faster than disengaged employees. Customers are increasingly busy, and want more time to spend on personal endeavors.

The fact that an engaged employee will be able to help a customer in a more efficient manner will stand out in the minds of your customer. They will return and purchase from you again because it is easy and hassle-free. As a result, they will become more loyal to your organization.

### 3. Engaged employees make your organization more customer focused

Engaged employees truly care about the customers of your organization. They not only want to meet the needs of these individuals, but also make them feel special and valued. These types of employees have a customer-focused approach in all that they do. This is the type of focus every organization should have. Your customers are the reason you are even in business in the first place, so why wouldn't you cater to their needs? This new strategy of putting the customers in the spotlight is called "customer centricity." It requires businesses to understand their customer's problems, and look out for their interests.

Engaged employees allow you to develop that outward focus that is highly sought after. Customers will become loyal to you if they see that your underlying goal is to serve them. They want to feel valued, be treated as an individual, and receive empathy if they have a complaint.



# So, what is the real cost of losing an employee?

**The Society of Human Resource Management outlined factors a business should consider in calculating the "real" cost of losing an employee. These factors include:**

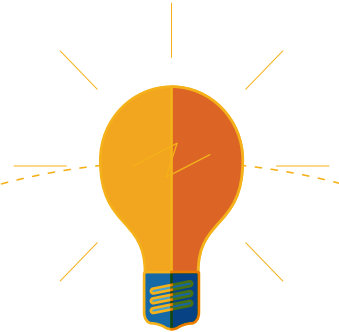
- The cost of hiring a new employee including the advertising, interviewing, screening, and hiring.
- Cost of on-boarding a new person including training and management time.
- Lost productivity...it may take a new employee 1-2 years to reach the productivity of an existing person.
- Lost engagement... other employees who see high turnover tend to disengage and lose productivity.
- Customer service and errors, for example new employees take longer and are often less adept at solving problems.
- Training cost. For example, over 2-3 years a business likely invests 10-20% of an employee's salary or more in training
- Cultural impact... Whenever someone leaves others take time to ask "why?"





# TIPS FOR MANAGERS

1. **Have Standards:** Make sure your team is familiar with all your company call handling standards.
2. **Call Criteria/Check list:** Create objective criteria on which they'll be evaluated and coached when handling calls.
3. **Monitor calls often** in order to collect meaningful data, evaluate the calls against the criteria you set and share the results with your team one-on-one. If there's opportunity to praise how they handled a call, do so in a team meeting.
4. **Coach team members consistently** and make sure they understand what it means to perform above average for both themselves and the company.
5. **Allow team members to provide feedback** on thoughts and ideas they feel will help with improving customer call handling or sales appointment setting criteria.



# EVALUATION CHECKLIST

## Creating your company's Call Quality Evaluation Checklist

Use the following list to guide you when developing your own Call Quality scorecards for your team. We recommend you start with a short list of “must have” items for each stage of calls and review performance on a regular basis to encourage improvement and add new items as employee confidence and skills are built over time.

### Greeting -

- The employee adhered to the recommended greeting
- If the call was transferred, the employee adapted their greeting accordingly
- The employee identified themselves to the customer
- The employee mentioned your company name
- Optional: The employee stated that the call is being recorded (if using this feature)
- The employee asked for the caller's name
- The employee thanked the customer for calling
- The employee offered assistance to the caller

### Customer Verification -

- The employee verified the customer's account using the appropriate information (e.g., first and last name spelling, account number, credit card number, transaction number, social security number, amount of previous bill or purchase, etc.)
- The employee accurately accessed the customer's account with the information provided
- If the call was transferred, the employee sufficiently adapted their account verification questions accordingly

# EVALUATION CHECKLIST

## Contact Information Confirmation/Verification -

- The employee asked for the caller to spell their name
- The employee asked for the caller's company name
- The employee asked for the caller's telephone number
- The employee asked for the caller's email address

## Problem Solving Abilities -

- The employee apologized for the issue, inconvenience or cost associated with the problem
- The employee took ownership of the problem
- The employee asked pertinent questions to accurately diagnose the problem
- The employee requested the error/issue details from the caller
- The employee used appropriate company resources to address the issue (prior to seeking manager involvement)
- The employee provided the most appropriate solution
- The employee informed the customer of the estimated time-line to resolve their issue
- The employee informed the customer of relevant supporting documentation to help resolve the issue
- The employee provided a reference number to the customer after resolving their issue
- The employee confirmed that the issue was resolved or the transaction was complete
- The caller's issue was sufficiently addressed

# EVALUATION CHECKLIST

## Protocol Compliance -

- The employee updated the customer's contact information in the company's computer system (CRM) and relevant business tools
- The employee documented important information in the notes regarding the call
- The employee received prior authorization when negotiating prices, offering discounts or giving refunds
- The employee quoted the customer with the correct price for the product or service
- The employee recommended the most appropriate product, service, or pricing plan
- The employee leveraged up-selling and cross-selling opportunities to additional products/services
- The employee informed their colleagues of a new bug, issue, or product/service issue

## Call Handling Skills -

- The employee followed correct procedures for placing the customer on hold
- The employee followed correct procedures for transferring the call
- The employee followed correct procedures for conferencing in a colleague
- The employee followed correct procedures for escalating a call to their manager

# EVALUATION CHECKLIST

## Customer Service Quality -

- The employee used the caller's name throughout the call
- The employee summarized the customer's main points before troubleshooting or offering a solution
- The employee received the caller's permission to place them on hold before doing so
- The employee limited the duration of hold time to an appropriate amount
- The employee muted the caller when appropriate
- The employee answered the customer's question correctly
- The employee transferred the call to a colleague when necessary and/or appropriate
- The employee conferenced in a colleague when appropriate
- The employee adequately addressed the caller's needs
- The employee transferred the call to a manager when the customer requested for them to do so

## Call Etiquette -

- The employee used the proper pronunciation of the caller's name
- The employee maintained proper tone, pitch, volume and pace throughout the call
- The employee used courteous words and phrases
- The employee adapted their approach to providing service to the customer based on the customer's unique needs, personality and issues
- The employee avoided long silences during the call
- The employee did not interrupt or talk over the customer
- The employee remained confident throughout the call
- The employee refrained from using industry or technical jargon
- The employee was friendly, polite and professional
- The employee used effective active listening skills

# EVALUATION CHECKLIST

## Script Compliance (if used) -

- The employee maintained adherence to the script
- The employee adequately adapted their approach to interacting with the customer, within the script(s) guidelines, when necessary
- The employee deviated from script when necessary

## Closure -

- The employee adhered to the call closure guidelines
- The employee adhered to the call closure script (if used)
- The employee set a follow-up appointment when necessary
- The employee asked the customer if they have any additional questions or issues before ending the call
- The employee asked the caller if the service they were provided met their expectations
- The employee asked the caller if there was anything they can do to enhance the service they provide them
- The employee thanked the customer for calling

## Follow-up -

- The employee followed up with customer within the agreed upon time frame discussed
- The employee introduced themselves to the customer and the reason for their call
- The employee adequately addressed the customer's questions
- The employee adequately resolved the customer's issue, or provided a time frame for resolution