

PPAI

North American
Leadership
Conference™

Connection.
Collaboration.
Leadership.

EX = CX², Employee Xperience = Customer Xperience, Squared

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$$EX = CX^2$$

Level Up Your Culture Vibe

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Level Up Your Culture Vibe



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Who is on your Hall of Fame of Influence?

HALL OF FAME



EX=CX² Culture Overview – 10 Tips

- 1. Hire for Culture Fit
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Tip 1: Hire for Culture Fit

- **You can train to follow process but not a person's character.**
- Genuine and Authentic alignment to Core Values.
- **Take time to get this right. (Don't just hire to fill an opening)**
- Three perspectives help shape the culture fit perspective:
 - HR
 - Hiring manager
 - Agent prospective employee sits with

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Tip 2: Hire Slow – Fire Fast

- **Hiring process is a two-way street.**
- Take your time, Candidate assessment isn't speed dating.
- Incorporate Job Shadowing.
 - Mutually beneficial for both the business and candidate.
 - Ensures expectations are better grounded, (reduces new-hire role surprises).
- Monthly new hire review to assess alignment and performance.
 - Weekly assessments for initial first 3 months of onboarding.
 - Onboarding reviews identify members better suited employed elsewhere.
- Realized a 20% reduction in short-term attrition rates.

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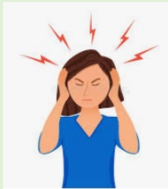
Tip 3: Clearly Define Agent Success

- **How do you know when you've had a "Good Day"?**
- Establish Key KPI's. More isn't better.
 - Data rich environment. Avoid-If we can track it, measure it.
- Take time to communicate performance expectations.

Tip 3: Clearly Define Agent Success

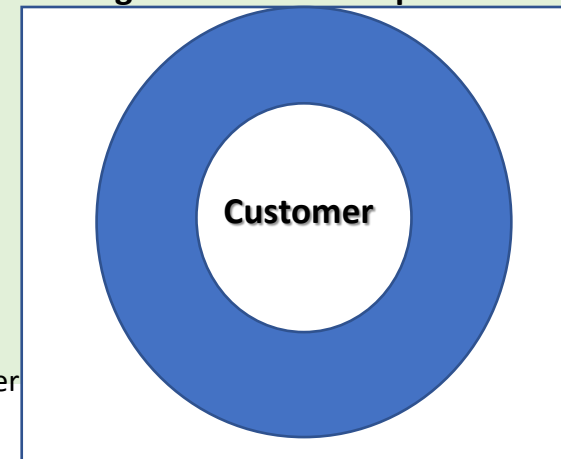
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Too Many = Lack of Clarity



The Fewer KPI's the better

Align to Customer Experience



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Tip 4: Relational Leadership

- Leadership demonstrates a **Genuine and Authentic** behavior.
- Three key aspect for success:
 - Communicate, Communicate, Communicate.
- Engagement is cultivated through continual communication.
- Employees leave managers not companies.
- Take the time to listen – not check off as a “To-Do” task list.

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Tip 5: Transparency

- How do you know if you've had a good day?
- Daily performance results by agent published every morning.
- Weekly business scorecard is distributed company wide.
- Monthly employee meeting where CEO shares company performance along with progress on identified priorities/Rocks.
 - Meetings are in-person and streamed for all to view live or watch the recorded version.

Tip 5: Transparency

Speech-Text Analytics:

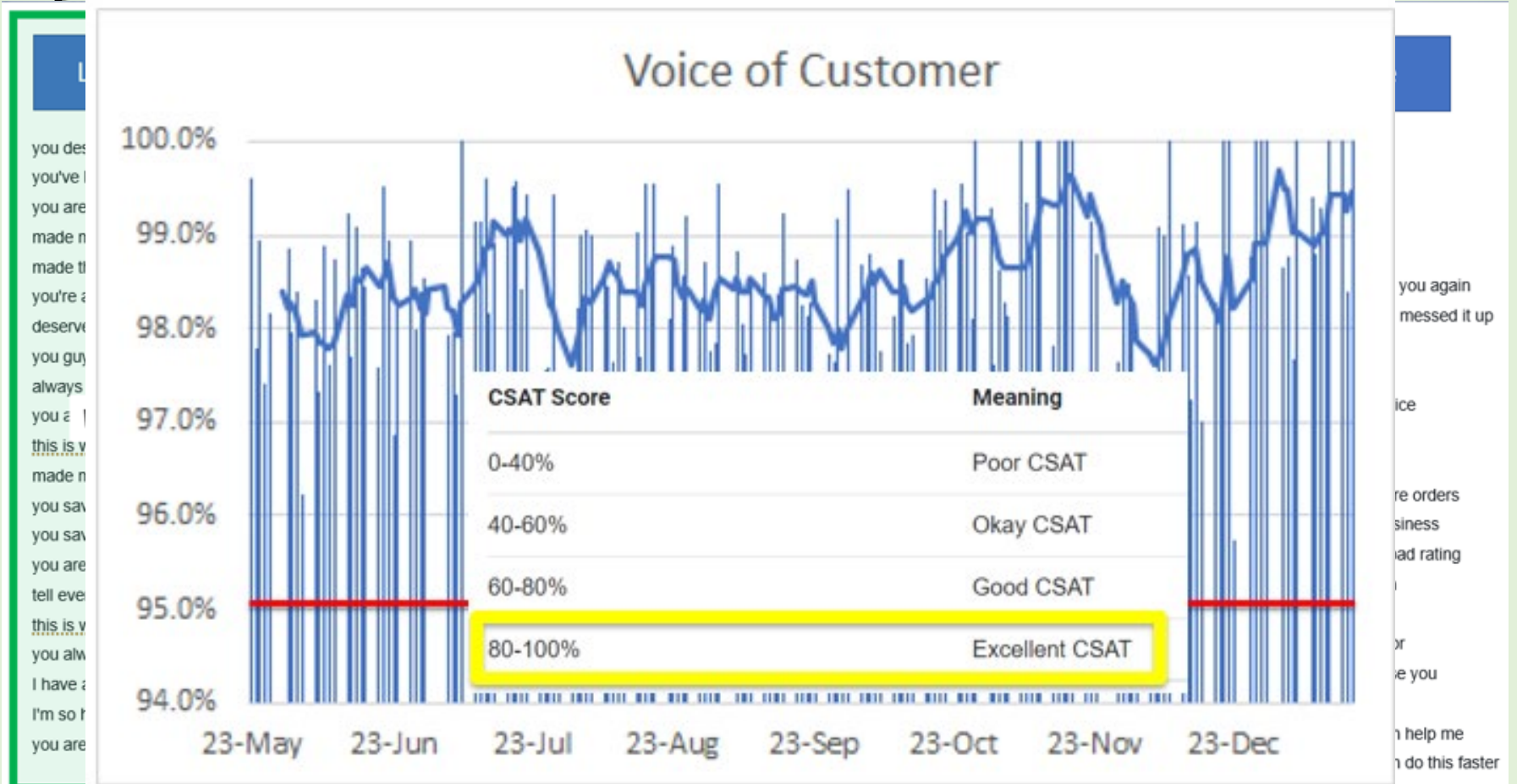
- Scans Recorded Calls
- Identifies key phrases
- Customer Sentiment

Legendary	Good	Neutral	Poor	Negative
you deserve a raise	thank you for all the help	good to go	I've called multiple times	bad company
you've been so helpful	nice talking to you	I'm all set	told me this would ship	horrible company
you are always so patient with me	thank you so much	that should do it	rescheduled again	lousy company
made my day	that was easy	that should take care of it	keep pushing out the ship date	rotten company
made this so easy	always enjoy working with you	that took care of everything	that is not what I was told	terrible company
you're amazing	answered all my questions	that took care of it	* keeps telling me different things	I will never order from you again
deserve a raise	's perfect	that's all for now	given wrong information	my first order and you messed it up
you guys are the best	wonderful	sounds good	* speak to a supervisor	bad customer service
always love using you *	sounds good	that is all	* speak to a manager	horrible experience*
you & We summarize Legendary and Good		that about wraps it up	I was told it would ship	terrible customer service
<u>this is why</u> I choose you	hope you have a good rest of your day	have nothing else	it will miss the event now	wors* experience
made my week	* great talking with you	no more questions	told me this would ship	I will never trust you
you saved my order	I really appreciate that	you took care of it	stop interrupting	I will not place anymore orders
you saved me	you are always professional	answered my question	no one told me	I will be pulling my business
you are my hero	you always answer the phone right away	makes sense	why was I not informed	I will be giving you a bad rating
tell everyone how great you are	you have a good personality	thanks for the info	long lead times	never using you again
<u>this is why</u> I only use you	you are wonderful	thanks for the help	why didn't someone tell me	Finished with you
you always make things right	you're a good partner	thanks for trying	why wasn't I notified	look for another vendor
I have a compliment	you always take care of us		was never told	tell everyone not to use you
I'm so happy with the work you guys do	I appreciate you taking care of that so fast		prices went up	give a bad rating
you are one of my best suppliers	graphics turned out beautifully		shipping cost is a lot	find someone who can help me
	you take the time to answer all my questions		quality was poor	find someone who can do this faster

Tip 5: Transparency

Speech-Text Analytics:

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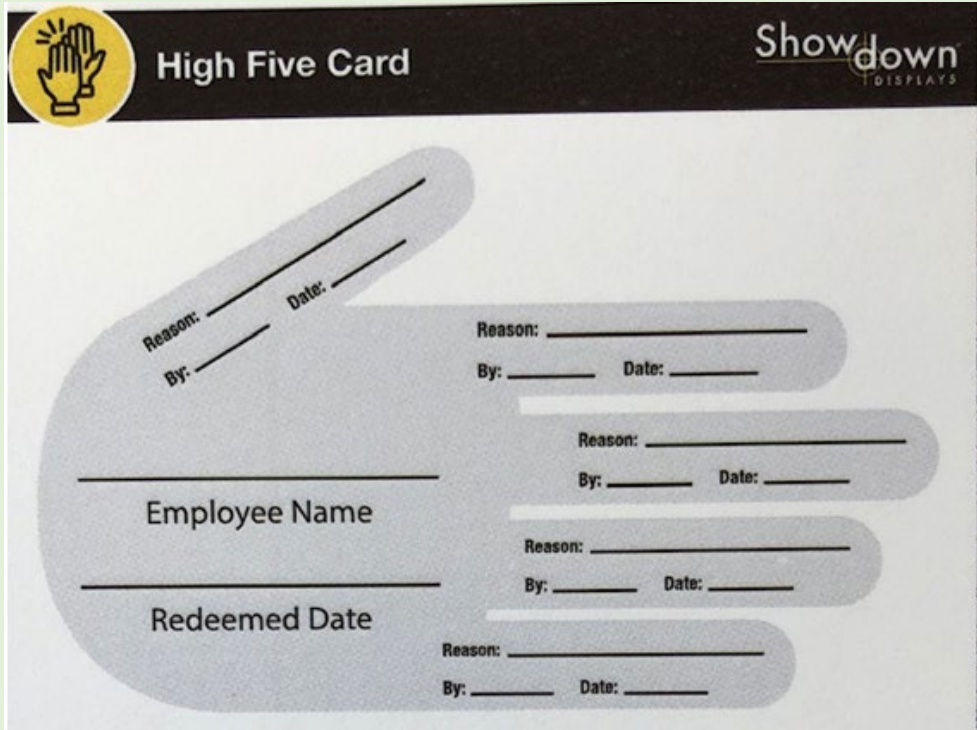
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Tip 6: Performance Recognition

- High-Five recognition program created.
 - Performance or displayed Core Value.
 - Anyone in a leadership role can recognize a High-Five moment.
 - Exceeding daily metric targets results in a High-Five.
- Once you have 5 High-Fives, able to redeem for Amazon gift card.
- Advent of hybrid schedules generated need to deliver awards virtually.
 - Utilization of Salesforce badges along with Amazon gift cards emailed.

Tip 6: Performance Recognition

- High-Five recognition program created.



The image shows a 'High Five Card' form template. At the top left is a yellow circular icon with a hand and five stars. The title 'High Five Card' is in the top left, and 'Showdown DISPLAYS' is in the top right. The form is shaped like a hand with five fingers. Each finger has a 'Reason: _____' and 'By: _____ Date: _____' label. The palm area has 'Employee Name' and 'Redeemed Date' labels.

Value.

to recognize a High-Five moment.

results in a High-Five.

able to redeem for Amazon gift card.

Tip 6: Performance Recognition

- High-Five recognition program created

High Five Card Showdown DISPLAYS

Reason: _____ Date: _____
By: _____

Reason: _____
By: _____ Date: _____

Reason: _____
By: _____ Date: _____

Reason: _____
By: _____ Date: _____

Reason: _____
By: _____ Date: _____

Employee Name _____

Redeemed Date _____

NAME	CALL EXPERIENCE	ADHERENCE PERCENTAGE	SF CALL LOG PERCENTAGE
Carlson, George	86.0	98.5%	90.0%
Talbert, Jodi	81.5	99.7%	63.6%
Burton, Jaid	81.5	83.5%	69.2%
Thielen, Sarah	79.0	89.3%	129.6%
Summers, Callista	78.5	92.5%	90.0%
Iskierka, Sophia	76.0	89.2%	114.3%
Vyskocil, Ash	75.5	87.5%	73.7%
Broennimann, Spencer	74.5	86.9%	78.3%
Samuka, Stephanie	73.5	89.7%	81.8%
Bona, Theresa	73.0	92.1%	86.4%
Edstrom, Haley	73.0	96.3%	95.5%
Haugen, Sean	71.5	89.2%	76.2%

Tip 6: Performance Recognition

- High-Five recognition program created

High Five Card Showdown DISPLAYS

Reason: _____ Date: _____
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Vyskod			73.7%
Broen			78.3%
Samuk			81.8%
Bona, Theresa	73.0	92.1%	86.4%
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Salesforce High-Five

"You've received a High 5!
Congratulations on your High 5!"

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Tip 7: Celebrate the “WOW”

- Take time to recognize **Customer Love** moments.
- Created a “WOW” program that recognizes those moments with a **Golden High-Five** lapel pin along with an Amazon gift card.
- Sources of feedback can come across all customer channels, recorded calls, emails, webchat and fellow team members.
- Improved ability to identify WOW moments utilizing speech/text analytics within our telephony system.
- Outcome drives friendly competition to acquire Golden High Fives which results in elevated customer experiences across all interactions.

Tip 7: Celebrate the “WOW”

- Take time to recognize Customer Loyalty

- Celebrate “WOW” moments that result in a high score



- Outcome: ***Friendly Agent Competition to Achieve Golden High-Fives** which results in elevated customer experiences across all interactions.

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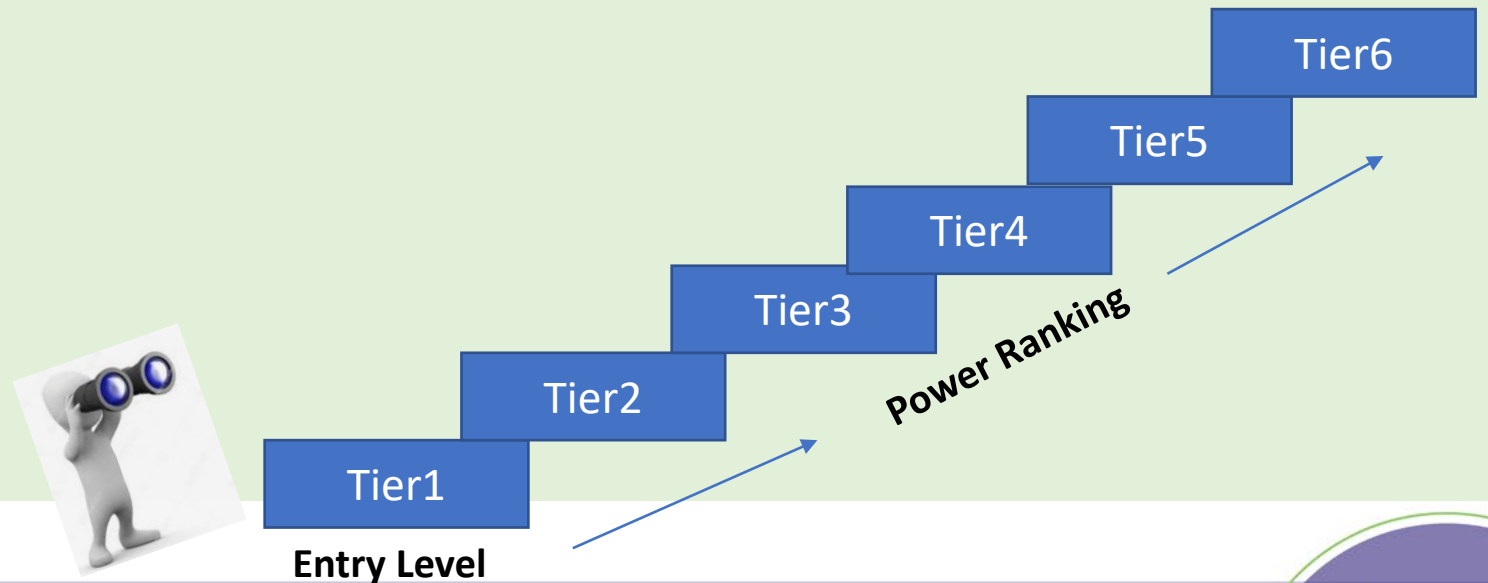
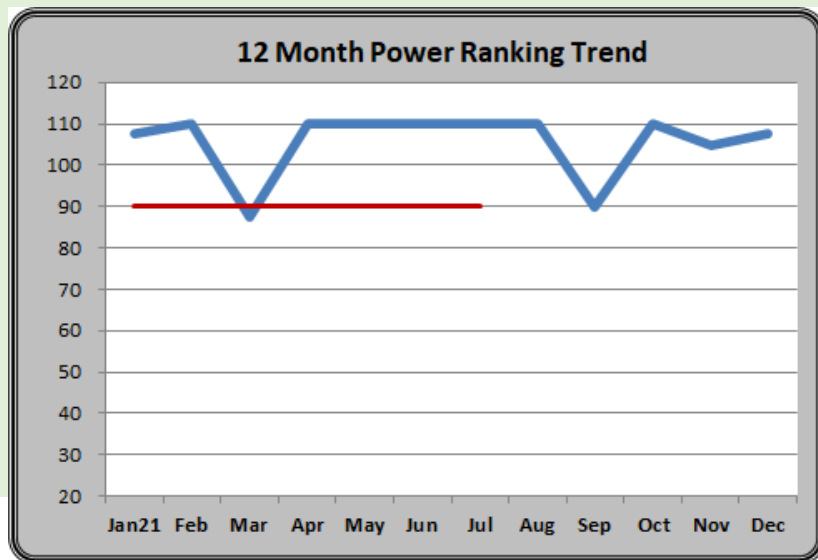
Tip 8: Career Path Clearly Defined

- **Communicate career path and the “How” to achieve advancement.**
- Agent monthly performance tied to an overall score, (Power Ranking).
- Performance based advancement ensuring it's measurable and employees are able to track their progression.
- Their weighted score/Power Ranking is one of the primary basis for advancements within Job Position Tiers.
- When agents achieve high Power Ranking scores over a period of time, they will be eligible to be promoted into higher Tiers.

Tip 8: Career Path Clearly Defined

*Power Ranking = GPA

SCORE CARD							POWER RANKINGS					Power Ranking
Date	Name	Call Experience	Schedule Adherence	Claims	SF Call Log	Attnd	Call Experience	Schedule Adherence	Claims	SF Call Log	Attnd	
	Target	>= 75	>= 85%	=0	>= 70%	<= 2						
	LuAnn Wagendorf						50.0	35.0	5.0	5.0	10.0	
July	LuAnn Wagendorf	77.7	87.3%	0	134.2%	0.0	40.0	30.0	10.0	10.0	15.0	105.0
Aug	LuAnn Wagendorf	79.3	86.6%	0	123.6%	0.0	40.0	30.0	10.0	10.0	15.0	105.0
Sep	LuAnn Wagendorf	77.8	89.0%	1	114.3%	0.0	40.0	30.0	(5.0)	10.0	15.0	90.0
Oct	LuAnn Wagendorf	77.8	88.7%	1	124.0%	0.0	40.0	30.0	(5.0)	10.0	15.0	90.0
Nov	LuAnn Wagendorf	76.7	90.5%	0	82.7%	0.0	40.0	35.0	10.0	10.0	15.0	110.0

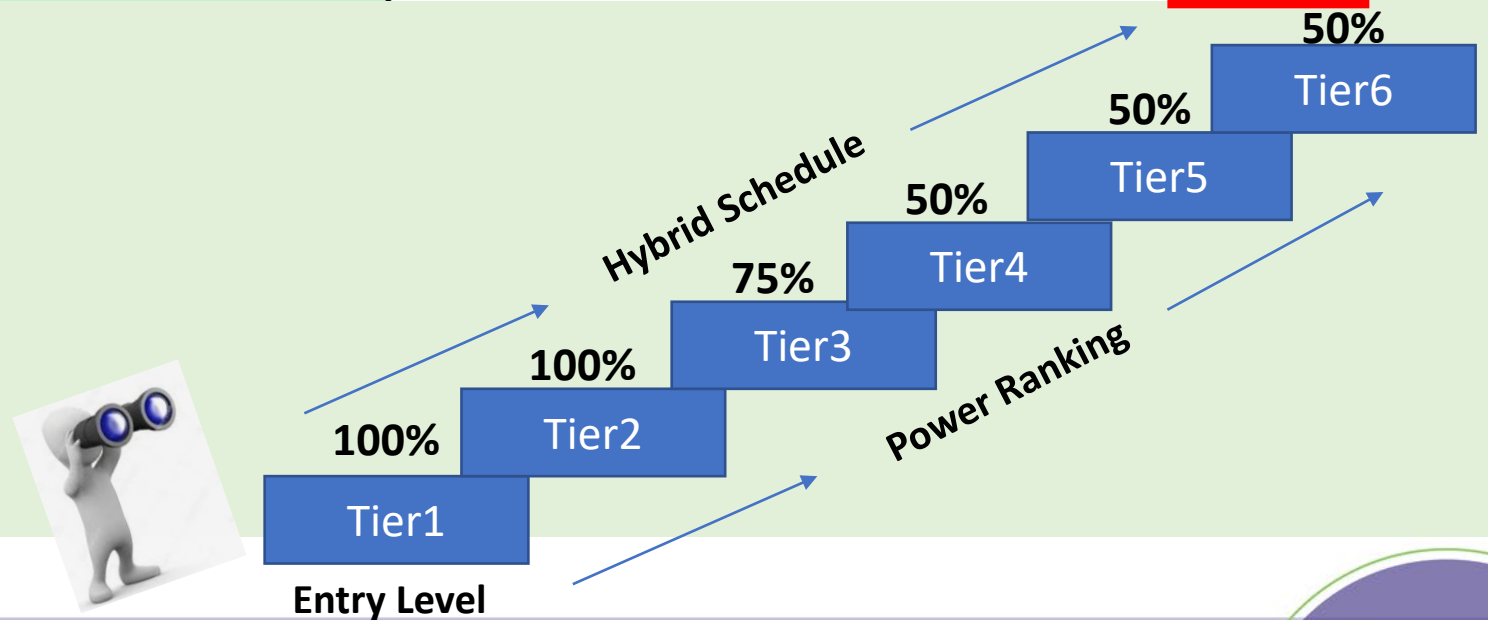
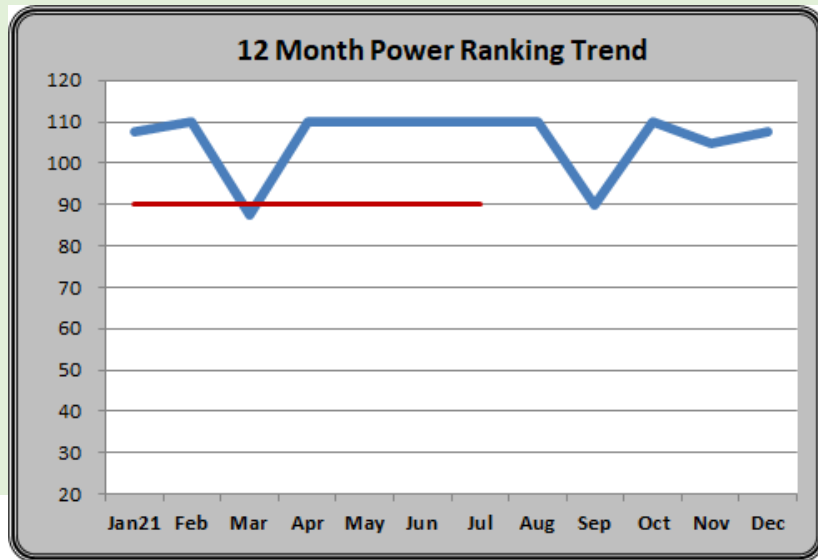


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Tip 9: Employee Engagement Team

- Establish an **employee led team to generate engagement ideas** that will resonate throughout the department. (Team “Vibe”)
- Keep the team relatively small and nimble.
- Participation is voluntary.
- Refresh team members each year – helps to keep ideas fresh.
 - A leadership team member acts as moderator of the team.

Tip 9: Employee Engagement Team



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- 10. **Have Fun!**

Tip 10: Have Fun!

- **Don't take yourself too seriously.**
- Random customer phone option to hear instructions from a voice character – most notably a Pirate, Surfer Dude, Buddy the Elf, etc.
- Encourage spontaneous company wide events.
 - Thawsgiving/Thursday-Long cold winter brought in DQ treats,
 - Medallion hunt during St. Patrick's day, etc.
- Encourage all organizational layers to participate.
- **Shared experiences help to knit the fabric of your culture tighter.**





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Would Your Team List You?





Thank You!



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