BOOST YOUR CULTURE

How Montessori Principles Can Transform Change
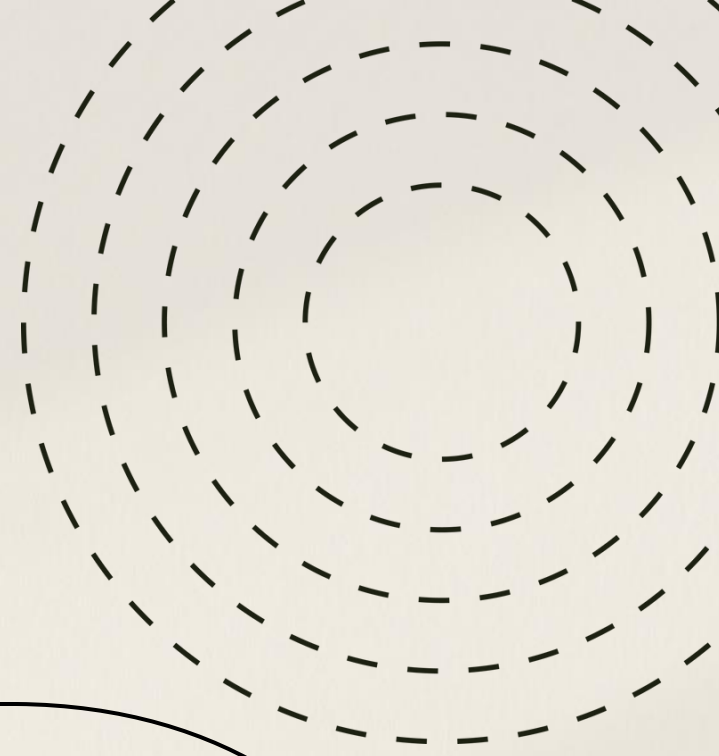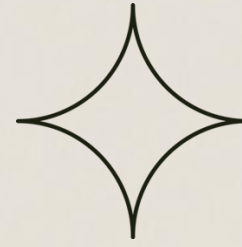
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Allied Solutions

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- *My Path from Teaching to Leadership*
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- *Agent-Level Case Studies*
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Introduction

Introduction

Graduated from Ball State in 2006 with a degree in Secondary English Ed, focusing on Middle School

Specialized in non-traditional methods of teaching

Taught for seven years, mostly as a Montessori Middle School teacher

Why Middle School?

- Kids are on the precipice of adolescence
- Students are justice-oriented as they determine their beliefs
- Enjoy helping untangle emotional turmoil

Why Montessori?

- Focus on pivotal developmental timeframes
- Places equal weight on social, emotional, and academic growth
- Cross-curricular learning

Social Development

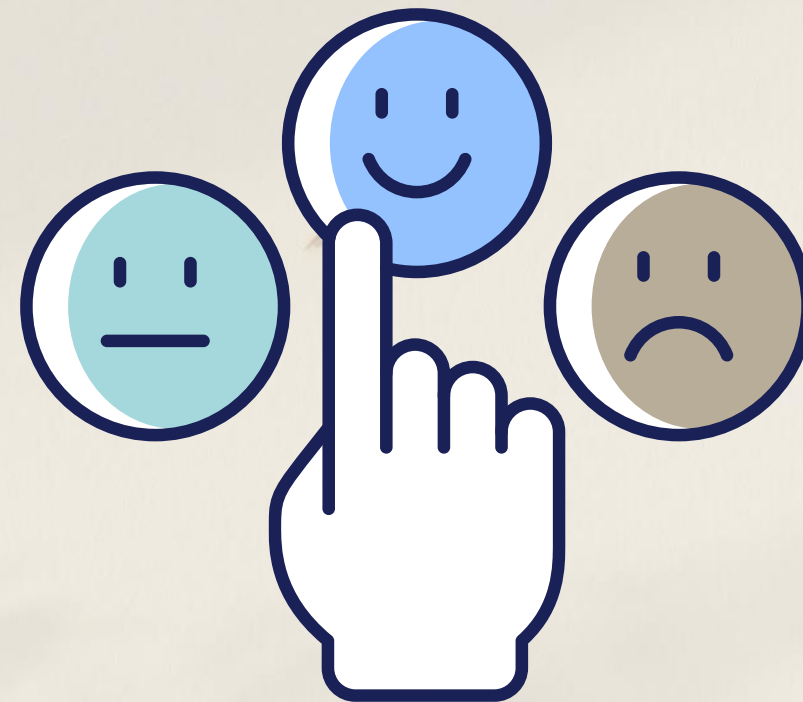Learning through school and class community

Emotional Development

Emotional growth impacts ability to gain cognitive development

Academic Development

Academic growth is child-led (but with a lot of structure)

Montessori Principles

Community Leaders

Abstract Application of...

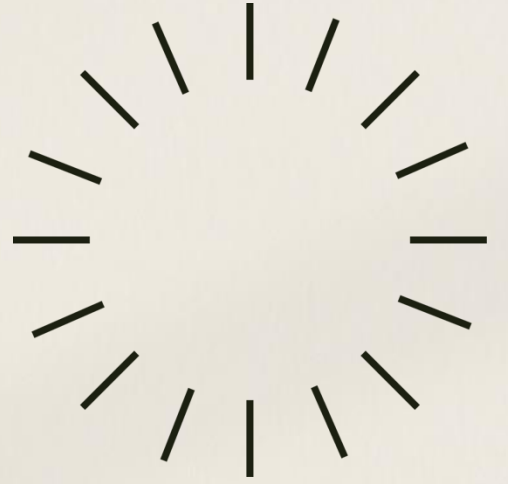Self-Motivated Learners

Critical Thinking Skills

Effective Conflict Resolution

Montessori Outcomes

How is a Call Center Like a Middle School?

- Associates on the precipice of higher level professional work
- Focus on pivotal professional development needs
- Untangling emotional turmoil to find solutions

What does Montessori look like in leadership?

The Need for Social-Emotional Development in Contact Centers

In a field largely dedicated to efficiency, why focus on educational or emotional development principles?

- As we automate the easiest processes, which processes reach our staff?
- As we utilize chat bots and automated emails for the least emotionally volatile customers, who will be utilizing the call center?
- **What is customer service - if not social and emotional work?**

Social Impacts

Social Impacts

Leadership to Agents

Agents to Customers

Emotional Impact

Emotional Impact

Leadership to Agent

Agent to Customers

"Academic" Growth

Skill Building

"Academic Growth"

Replacement Behaviors

Front Line Leaders to Agents

What is the social norm needed?	What pattern of behavior is causing these contacts to become ineffective?
What is the social-emotional impact for the customer?	What did the customer need, but what did they receive instead?
What is the social-emotional impact for the agent?	What social-emotional reaction from the agent is causing the ineffective behavior?
What is the replacement behavior?	What do they need to do instead?
What skill building needs to be done?	What can I do to help them build this skill?

Creating Coaching Plans

Goal	Before Social-Emotional Development	After Social-Emotional Development
85% of surveys rated as Excellent	75% rated as Excellent	
Promoted to next job profile	1 year without in-line promotion	
Reduction in Supervisor Calls	Frustrated callers frequently needed me to intervene	

Case Study - Amber

What is the social norm needed?	When a customer would ask a clarifying question, she would repeat the exact same answer, in the same tone.
What is the social-emotional impact for the customer?	They needed to feel heard, and they needed to know the person they were speaking to understood their question.
What is the social-emotional impact for the agent?	She had previously been given scripts to help her AHT, and she was hesitant to change those scripts to avoid going long or giving incorrect information.
What is the replacement behavior?	Slightly change answers to clarify for the customer, ask what was still confusing to the customer.
What skill building needs to be done?	Roleplay asking the same question over and over, giving different answers each time.

Case Study- Amber

Goal	Before Social-Emotional Development	After Social-Emotional Development
85% of surveys rated as Excellent	75% rated as Excellent	89% rated as Excellent
Promoted to next job profile	1 year without in-line promotion	Promoted through two promotions within next year
Reduction in Supervisor Calls	Frustrated callers frequently needed me to intervene	More capably prevented escalations through better conversation

Case Study - Amber

Goal	Before Social-Emotional Development	After Social-Emotional Development
85% of surveys rated as Excellent	80% rated as Excellent	
No more than 3 seconds of Wrap-Up per call	10 seconds per call	
Reduction in Supervisor Calls	Would give up on calls and offer a supevisor	

Case Study - Chris

What is the social norm needed?	Would interpret frustration as anger, often mistaking a neutral tone for screaming
What is the social-emotional impact for the customer?	Need to be able to express that a situation is frustrating or confusing without being shut down.
What is the social-emotional impact for the agent?	Based on past life experiences, struggles with hearing "anger." Feels nervous and wants to escape, then needs several minutes to calm down after calls.
What are the replacement behaviors?	Respond to emotion at the top of the call, restate potential solutions as "the best option." Don't use your sup as a crutch!
What skill building needs to be done?	Roleplaying customers who are tense but not angry, practicing providing solutions and responding to emotion.

Case Study - Chris

Goal	Before Social-Emotional Development	After Social-Emotional Development
85% of surveys rated as Excellent	80% rated as Excellent	84% rated as Excellent
No more than 3 seconds of Wrap-Up per call	10 seconds per call	5 seconds per call
Reduction in Supervisor Calls	Would give up on calls and offer a supevisor	More capably prevented escalations through solution-focused conversation

Case Study - Chris

Agent Coaching Plans

Agent Coaching Recap

Informing Change Management

Change and People

- Your team has to **want** to change
  - How do you appeal to their logic **and** feelings?
  - How do you know their social-emotional needs if you don't ask?
  - How do you let them know you prepared for their social-emotional needs?

What change is needed?	What is being implemented, and what is the intended improvement?
What is the social-emotional impact to people leaders?	What social-emotional struggles could your people leaders have in being the face of the change?
What is the social-emotional impact to the front line associates?	How is the change going to impact the way your associates interact with your customers, and what will they like/dislike about that?
What social-emotional needs need to be addressed in the roll-out?	Out of the feedback you received, which needs need to be acted on and addressed during the roll-out?
How will you communicate the social-emotional needs were considered?	As you and your leaders roll out the change, how will you ensure the whole team knows their needs were considered - whether or not they were acted on?

In Change Management

What change is needed?	We are automating our post-call surveys to gather more data and reduce workload for supervisors.
What is the social-emotional impact to people leaders?	
What is the social-emotional impact to the front line associates?	
What social-emotional needs need to be addressed in the roll-out?	
How will you communicate the social-emotional needs were considered?	

Case Study - A Popular Change

What is the social-emotional impact for the leader?

- Positive about automation
- Dissatisfied with survey questions
- Apprehensive about agent buy-in
- Concerned about ease of coaching

Case Study - A Popular Change

What is the social-emotional impact for the agent?

- Concerned about control over metric
- Concerned about scorecard performance
- Concerned that questions aren't about them

Case Study - A Popular Change

What social-emotional needs need to be addressed in the roll-out?

- Change the questions
- Create effective reporting for leaders
- Provide soft skills training for agents
- Allow for 60 days prior to scorecard changes

Case Study - A Popular Change

How do you communicate the social-emotional needs were considered?

- Highlight feedback in training
- Meet with supervisors to collect dashboard feedback
- Set the scorecard minimum at a reasonable level

Case Study - A Popular Change

Month	Survey Volume	Survey Rating
April	7,033	4.38
May	8,715	4.36
June	9,260	4.38
July	11,000	4.39

Case Study - A Popular Change

What change is needed?	Our AHT could be reduced by asking callers how we can help them instead of assuming what they need.
What is the social-emotional impact to people leaders?	
What is the social-emotional impact to the front line associates?	
What social-emotional needs need to be addressed in the roll-out?	
How will you communicate the social-emotional needs were considered?	

Case Study - An Unpopular Change

What is the social-emotional impact for the leader?

- Distrust over change in guidance
- Apprehension about coaching tenured agents
- Distrust that the change will work

Case Study - An Unpopular Change

What is the social-emotional impact for the agent?

- Distrust in mixed messages from leaders
- Concern that change won't work
- Perceived loss of control in calls

Case Study - An Unpopular Change

What social-emotional needs need to be addressed in the roll-out?

- Confront limiting beliefs about wasting time
- Show that the change will improve results
- Highlight negative customer experiences with current process

Case Study - An Unpopular Change

How do you communicate the social-emotional needs were considered?

- Run a pilot group

- Talk about the pilot group throughout the roll-out

- Roll out training one team at a time

- Share results of the pilot group and department results in every subsequent training

Case Study - An Unpopular Change

Month	AHT Pre-Pilot	% of Proficient Agents	AHT Post-Pilot	% of Proficient Agents
Pilot Group	9:39	60%	9:06	70%

Case Study - An Unpopular Change

Month	AHT	% of Proficient Agents
May	10:30	49%
June	10:21	58%
July	9:20	80%

Case Study - An Unpopular Change

Change Management Planner

Change Management Recap

Agent Coaching Plans

Change Management Planner