

LEADS SHARING

Handoff Protocol Refresh

High-Level Design Plan

A need exists to reinforce with call center reps the types of calls that should be handed off to AMC account managers. It has been determined that reps often don't know the proper protocol for certain products/solutions requested by customers.

Stage 1 Solution

In June of 2018, a comprehensive transfer matrix was developed by SBAC M&P/Process Manager [REDACTED], who conducted T3s with call center Sales Managers and Sales Coaches to promote their use and dispersal to call center reps. Region-specific matrices were developed for Midwest/East, Southwest/West, and Southeast. These resources are continually updated and maintained by [REDACTED], and hosted on their respective regional homepages.

It has been determined that a fresh round of T3s for Sales Managers and Sales Coaches would help refresh familiarity with the key resources and drive promotion of the resources to the call center reps. [REDACTED] has expressed a willingness to conduct these sessions, and Learning Services will support this effort by whatever means are required.

What we can provide:

- Scheduling of virtual leader-led (VLL) sessions
- Creation of promotional messages or documents to drive adoption, including motivational success stories highlighting positive compensation consequences
- Development of reinforcement activities/huddle guides for team interactions
- Incorporation of DELIGHT principles/schedules into initiative

Stage 2 Solution

It has been suggested that an underlying cause of the transfer problem could be that call center reps may have difficulty recognizing the products/solutions for which customers are asking. For instance, because call center reps don't sell MIS or T1, they sometimes have trouble realizing that MIS or T1 would be the proper solution for a customer situation unless the caller specifically uses those terms to describe their need.

To address this, [REDACTED] has proposed a series of short WBTs, videos, or job aids that cover how to recognize – via customer comments and contextual cues – product asks that should be handed off to AMC. Depending on format, these could be assigned to call center reps as ongoing training (WBTs) or covered in team huddles organized by Sales Coaches (job aids).

[REDACTED] is currently in the process of developing a recommended solution.

Stage 3 Solution

It has been suggested that SBAC site visits by representatives of the AMC can help further the relationship and smooth interaction between SBAC call centers and the AMC teams. Particularly in circumstances where SBAC and AMC facilities are co-located, this is a relatively cost-effective and effectual way of sharing knowledge between the teams. In this scenario, an AMC Sales Manager or group of Account Managers would spend several hours (up to a full day) at the SBAC site offering tutorials and answering questions.

This proposal was brought up to the AMC leadership team, and its value endorsed. It has been done in the past on a small scale, with positive results (despite logistical challenges), but the expense may be an issue. The AMC's feeling at this time seems to be that a virtual version of such an interaction would not work as well.

MATRIX LOCATIONS

A customized Transfer/How to Handle Matrix for each region has been uploaded to the three regional homepages.

MW/E:

[REDACTED]

SW/W:

[REDACTED]

SE:

[REDACTED]

Note: The Midwest site was rearranged with all topics placed under the corresponding heading. The Transfer Matrix was placed under the reference column and alphabetical for the MW/E/SW/W sites and alphabetical (under the "T") for the SE site.