

# MYSTERY CALLING

Dialling up your contact  
centre performance

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**Driving a positive customer experience across all channels is critical to any organisation. Despite the growing use of new digital technologies, the telephone experience can still be a make-or-break moment for many customers. For the majority of large, multi-channel organisations, the contact centre is key in ensuring that callers receive a great telephony experience, as consistently and efficiently as possible. This experience will ultimately drive greater customer loyalty, higher profits, and better returns for shareholders.**

Increasingly contact centres are handling enquiries that customers are either unable to undertake face-to-face or are unwilling to conduct digitally; enquiries which are often complex in nature and can, therefore, have a significant impact on the brand if handled poorly. Contact centre agents have a huge responsibility to deliver customer experience which matches the expectations set by the brand promise.

Ipsos research<sup>1</sup> shows that almost half (48%) of customers who had suffered a poor contact centre experience were dissatisfied with how their issue was addressed. Three in ten of those (dissatisfied with resolution) reported that, as a result, they would stop using the company in question, or use it less.

Avoidable customer churn at the hands of contact centres is estimated to cost US business, alone, \$136 billion per year.<sup>2</sup>

While many contact centres function well, there is room for improvement. The focus of this paper is to look at the techniques employed to evaluate contact centre performance and, in particular, the role of mystery calling in helping to drive organisational performance improvements.



# HOW DO ORGANISATIONS MEASURE CONTACT CENTRE PERFORMANCE?

There is a plethora of ways in which organisations measure contact centre performance. These include:

- Customer feedback/voice of customer (VoC) surveys
- Call listening
- Operational metrics
- Artificial intelligence (AI) analytics, e.g. real-time speech analytics (RTSAs)
- Call recorded mystery calling.

All of these methodologies have their strengths and weaknesses, and understanding these will allow organisations to use them effectively. The following provides a brief overview of each one.

**Figure 1** Comparing measurement options

	Customer Feedback/VoC Surveys	Call Listening	Operational Metrics	AI Analytics	Mystery Calling
Represents voice of the customer (CX/selling focus)	●				●
Covers detail of call content (compliance focus)		●		●	●
Provides logistical metrics (efficiency focus)			●		●
Measures predefined enquiry type (e.g. simple vs. complex)					●
Allows for specific customer profile assessment	●				●
Captures date/time analytics	●	●	●	●	●
Suitable for high volumes	●	●	●	●	●
Enables competitor benchmarking	●				●
Delivers tactical/agent level feedback	●	●	●	●	●
Provides strategic direction	●		●	●	●

## CUSTOMER FEEDBACK/VOICE OF CUSTOMER (VOC) SURVEYS

These are direct surveys with customers – in this case, those calling a contact centre – to evaluate their experience. A range of techniques can be used, such as IVR-based surveys immediately following a call, to surveys undertaken at a later time, via SMS, for example. These can provide invaluable insights at both a tactical and strategic level, enabling the tracking of performance over time on key metrics, and identification of problem areas and key drivers of performance.

**CORE STRENGTH:** The true voice of the customer and, where sample sizes permit, the opportunity to provide agent-level feedback, as well as more strategic direction.

**WEAKNESSES:** May bias towards customers with polarised opinions; those reporting either poor (more likely to respond), or, indeed, extremely good experiences. Such results can, of course, still be extremely valuable, especially when used for tracking purposes.

## CALL LISTENING

Call listening is undertaken by most, if not all, contact centres. Typically, internal personnel – usually team leaders or quality managers – listen to actual calls (live or recorded) and provide feedback and coaching to individual agents to improve performance.

**CORE STRENGTH:** Detailed feedback at an agent-level, covering factors such as script adherence and compliance.

**WEAKNESSES:** Not an independent assessment; lacking aggregated, strategic insights. No real customer view.



## OPERATIONAL METRICS

Again, operational metrics are used by virtually all contact centres to objectively assess factors such as drop-out, waiting time, and average handling time (AHT).

**CORE STRENGTH:** Detailed, objective metrics aimed at driving efficiencies.

**WEAKNESSES:** No detail about the actual content of the call, nor do these metrics represent the customer view.

## AI ANALYTICS

Essentially, this is high-volume call listening undertaken by artificial intelligence (AI), based on analysing individual customer-agent discussions. By identifying key words and phrases, this approach is able to determine factors such as complaint levels, first contact resolution (FCR) and customer sentiment. However, despite the advantages of AI, it is impossible to understand exactly what a customer is feeling without asking them.

**CORE STRENGTH:** High-volume analytics of actual conversations.

**WEAKNESSES:** Cannot provide the true voice of the customer. While the technologies are improving all the time, and at a rapid rate, there are still such analytics failing to live up to the hype; failing to deliver the nuanced feedback promised, or, indeed, providing misleading data, such as the under- or over-reporting of complaints.



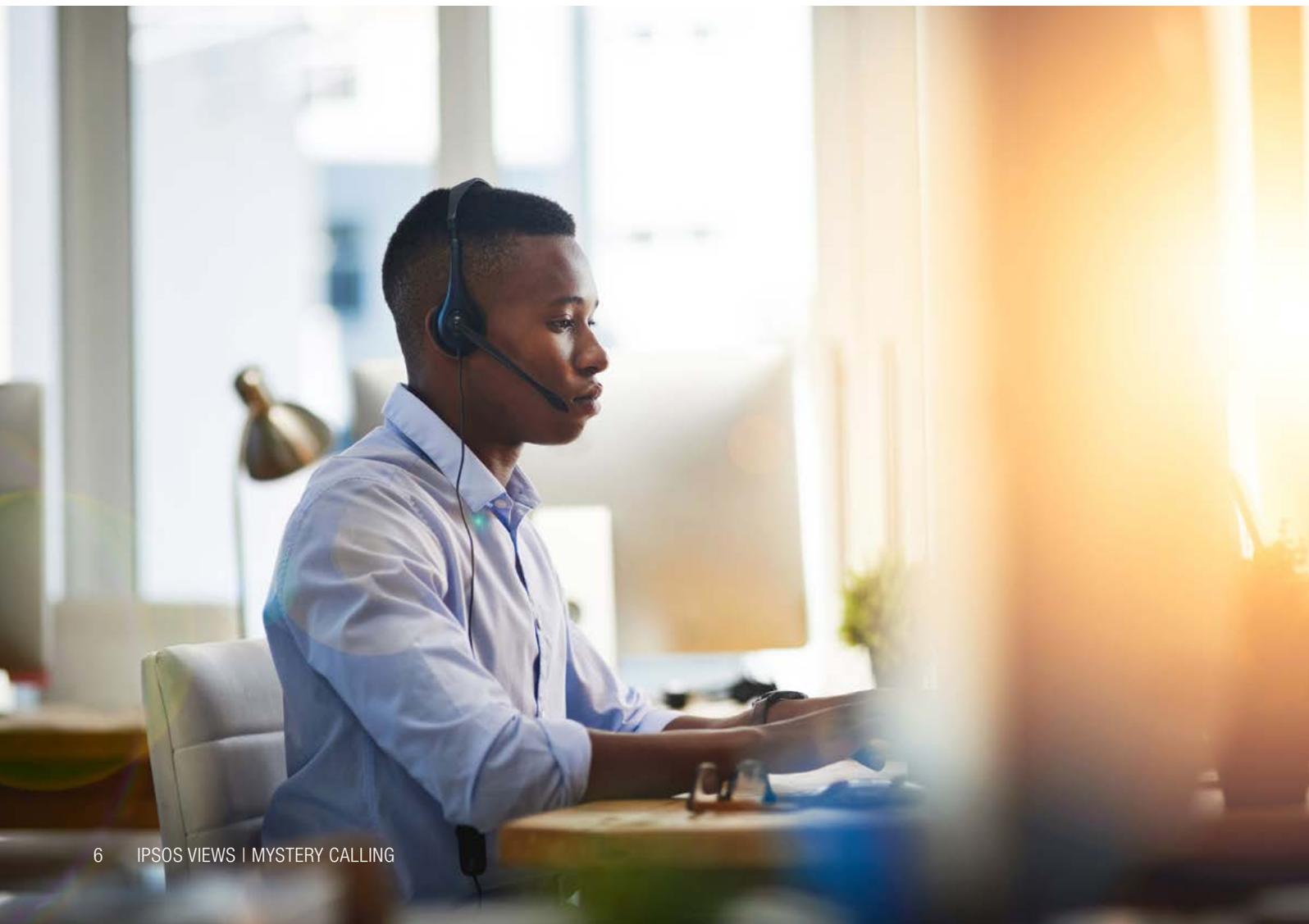
**It is naive to think that any one of these methodologies in isolation will meet all evaluation needs and, therefore, understanding how each method complements and adds to the others is key.**

# THE CASE FOR MYSTERY CALLING

Mystery calling has developed significantly in recent years and has become an integral part of the measurement ecosystem of many organisations, whether that is evaluating a particular channel, or as part of the omnichannel journey evaluation. Mystery calling is unique in enabling organisations to measure the following:

- The customer experience, sales behaviour, process efficiencies and compliance.
- The full end-to-end contact centre customer journey from dial-up, through transfers, to call conclusion.
- Detailed, objective feedback of observed agent behaviours, logistical metrics (AHT, on-holds/transfers, IVR systems and waiting times) *and* the more subjective customer view.
- In-depth analytics around the customer experience delivered and an understanding of why agents might behave in different ways.
- A competitor benchmark, where required.

Of course, mystery calling needs to work in conjunction with other measurement methodologies and a truly effective mystery calling programme will be designed around the insights from these approaches; for example, from the VoC programme which determines what truly matters to the customer and what will drive the desired customer outcomes. Only by doing this will mystery calling provide the feedback which will allow organisations to improve the handling of customer enquiries and complaints, deliver the desired sales experience, and ensure that agents are compliant and that customer communications are handled as efficiently as they can and should be – in short, to deliver customer experience which will drive improved acquisition rates, share of spend, retention, advocacy and operational efficiency.



# DESIGNING AN EFFECTIVE MYSTERY CALLING PROGRAMME

There are a number of factors that must be considered when designing an effective mystery calling programme in order to ensure that actionable insights are delivered.

## SHOPPER PROFILING AND SCENARIOS

For the vast majority of programmes, real customers are required, and while their enquiries may not be 100% 'genuine', scenarios will generally be 'everyday' scenarios that customers undertake. Therefore, the feedback is as real as possible. A further advantage is that mystery calling also enables the testing of more specific, often niche, enquiries.

No other approach allows both the customer type *and* the scenario to be pre-defined, however, again, it is important that profiles and scenarios are framed around data from other sources, which indicate where challenges lie.

We advise including at least a couple of different scenarios that should be resolved on first contact; as FCR is a strong driver of a positive customer experience. Companies that empower their contact centre agents to answer questions swiftly, correctly, and with conviction help win and retain customers.

It is becoming increasingly common to use mystery calling for understanding omnichannel customer journeys, where a customer may begin their enquiry via one channel (e.g. digital), but change to a second or third channel (e.g. telephone) – and the scenarios for testing should be designed accordingly.

## THE FEEDBACK MECHANISM AND QUESTIONNAIRE DESIGN

Mystery calling makes use of very detailed questionnaires – far more detailed than an actual customer would be willing, or indeed able, to complete. This is feasible because: (a) mystery callers know what they are assessing in advance; (b) they can take detailed notes during the conversation; (c) the questionnaire is answered during/directly after the call.

It is important to reiterate that questionnaires must be focused on the factors that matter most. Customer experience-based mystery calling studies should be built around key drivers (as identified from customer feedback), while the likes of compliance or sales-based mystery calling studies should focus more on scripting and specific agent behaviours.

Mystery calling results are increasingly based on analysis of covert recordings of the conversation. The recording of mystery calls allows for true validation *and* is more appropriate for highly detailed analyses, particularly relating to factors such as compliance.

Finally, it is imperative that questions relating to both the shopper profile (e.g. demographics, brand relationship, product holding) and operational metrics (e.g. FCR, IVR routing, call lengths, day of week, time of day) are included, so deep-dive analytics can be undertaken, providing answers to both the 'what' and 'why'.

## SMART SAMPLE DESIGN

Smart sample design is often dependent on budget and, while mystery calling can be a cost-effective measurement tool, this is still a factor to consider. The key things to take into account with sampling design are as follows:

- The size of the contact centre operation/number of agents.
- The number and location of individual contact centres.
- The number and nature of scenarios being tested, which may impact day and time calling quotas.
- Whether competitor calls are appropriate or necessary.

There is no one-size-fits-all approach, but a sufficiently robust and representative sample is necessary for undertaking detailed data analytics.

## ANALYTICS

To truly understand: (a) the experience from the customer's point of view; (b) what drives that experience; (c) how factors impact on those drivers, the mystery calling questionnaire, as outlined above, needs to be designed around key drivers and include profiling/logistical metrics. These allow for in-depth analyses pin-pointing problem areas and recommending areas for improvement. In addition, where other internal factors can be included (e.g. locations, agent-level data) an even more detailed understanding of performance can be gained.

Of course ideally, as well as standalone analysis, mystery shopping data should be interrogated as part of a wider data set, including the likes of that from VoC surveys, operational metrics, and indeed financial data, with the goal of building a detailed end-to-end picture of the health of the contact centre and the return on investment of improvement initiatives.

## IMPACT

A well-designed mystery calling programme will deliver business impact at both a tactical and strategic level. By assessing the full customer journey (both objectively and subjectively), clients are able to understand how operational metrics affect agent performance; and how agent performance impacts the customer. Feedback can be delivered at an individual level to improve performance, as well as being used strategically to drive improvements in operational processes, to ensure that agents are working to the best of their ability across the organisation.



## UNDERSTANDING THE FULL CUSTOMER JOURNEY TO HELP DELIVER A GREAT CONTACT CENTRE CUSTOMER EXPERIENCE

### SCENARIO

A **major public transport company** wanted to understand where improvements were needed across their contact centres to ensure a great customer experience.

### METHODOLOGY

A monthly programme of mystery calling, across a wide range of customer enquiries.

### RESULTS

Identified specific pain-points including those relating to an ineffective IVR system and poor agent performance. This led to operational system changes and specific training focused on common customer enquiries; resulting in an uplift in performance both in terms of efficiency gains and customer satisfaction.

## DRIVING COMPLIANCE

### SCENARIO

A **major bank** wanted to ensure that colleagues in contact centres – and branches – were handling enquiries in a compliant fashion. Non-compliance would result in heavy fines and damage corporate and brand reputation.

### METHODOLOGY

A programme of mystery calling, assessing a range of 'financial crime' scenarios, using our mystery callers with experience in this area.

### RESULTS

The bank was able to determine levels of compliance and training needs, thus mitigating potentially serious business risks and financial exposure.

## ASSESSING THE IMPACT OF INEFFICIENT AND POOR CALL HANDLING

### SCENARIO

A **regulator** wanted to evaluate contact centre performance in terms of customer service delivery and efficiency.

### METHODOLOGY

An extensive mystery calling programme using both typical and unusual/complex customer enquiries to assess helpline service.

### RESULTS

Identified inefficiencies caused by unresolved enquiries and overly lengthy calls. The client was able to pinpoint and act on the required training needs, so delivering an improved helpline customer experience, with greater efficiency.

## SUMMARY

Are your contact centres consistently delivering great customer experiences which meet your brand and service promises?

- How are you performing in terms of the factors that drive the desired customer behaviours? And what is driving that performance? Are there inconsistencies across the organisation?
- How do full omnichannel customer journeys work in practice? And, where is investment needed to ensure a seamless process?
- Are you maximising your sales opportunities while on the phone with customers and prospects?
- Are agents compliant in their interactions with customers, both in terms of meeting brand promises and regulatory requirements?
- How does your contact centre perform in the market context and what can you learn from best-in-practice operators?
- How do contact centres perform relative to others in the organisation, and what can you operationalise for best-in-practice methods moving forward?

A well-designed mystery calling programme will deliver insights that can lead to improvements in all aspects of contact centre performance: driving up sales, retention and advocacy on the back of great customer experience, while protecting the bottom-line thanks to compliant behaviour and efficient processes.



## REFERENCES

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2. <https://callminer.com/callminer-index-customer-churn-survey-us/>
3. <https://www.marketwatch.com/press-release/at-47-cagr-contact-center-market-size-to-register-us-40000-million-by-2025-2019-05-16>

## FURTHER READING

<https://www.ipsos.com/en/designing-better-mystery-shopping-programme>

# MYSTERY CALLING

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