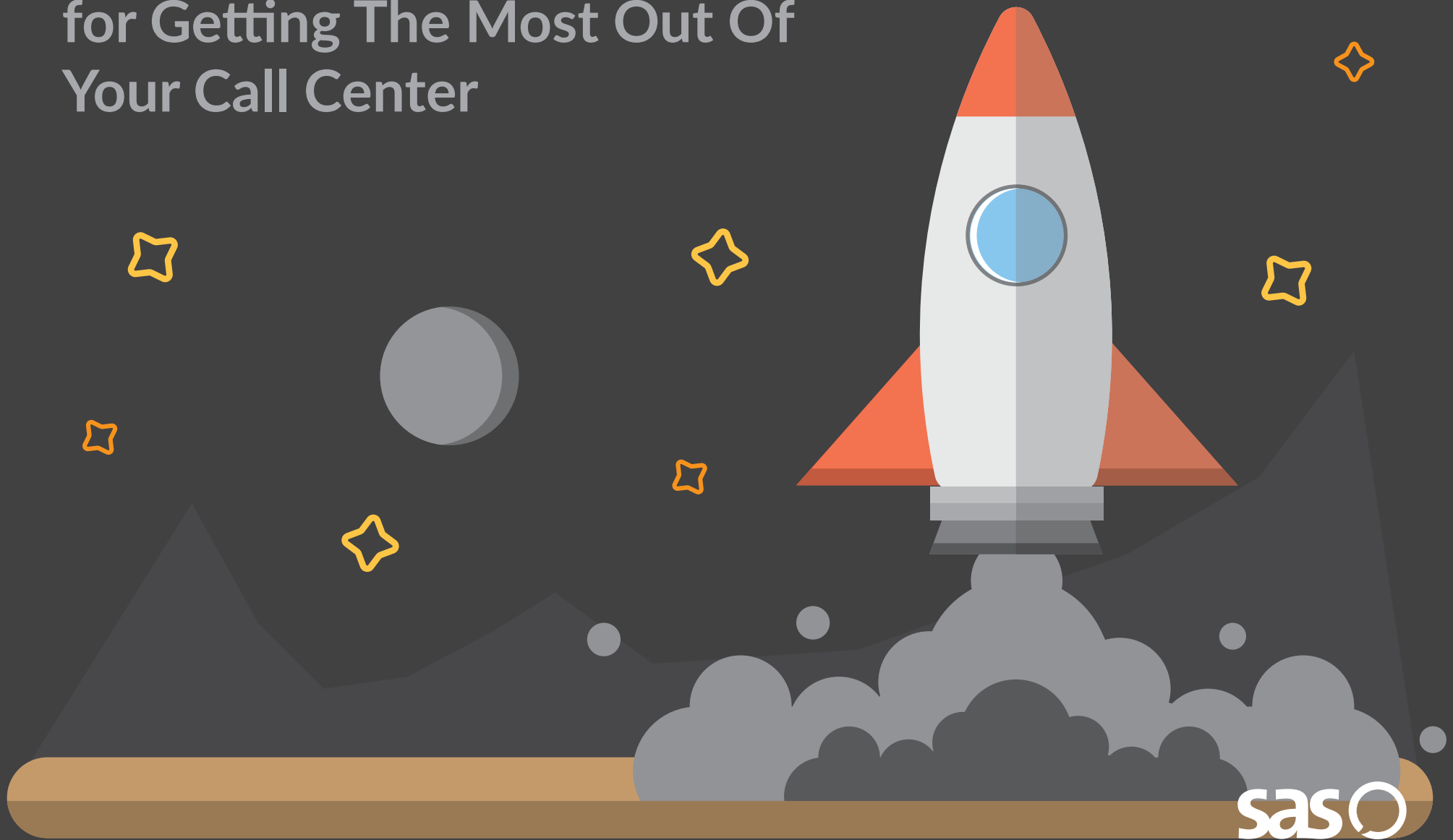# 25 Amazing Tips

for Getting The Most Out Of Your Call Center

sas

Here's what we came up with

1. Review and rate your calls on a weekly basis

2. Give input when customizing your script, but rely on the experience of your customer support rep to finalize the account

3. Understand that there will occasionally be hold times

4. Let the call center reps be honest with callers, and let them know they work in the call center

5. Keep your information current, like on-call data, emails, and phone numbers

6. There's a perfect amount of FAQ data you should enter, and you need to find that

7. Customers tend to exaggerate hold time experiences. Trust the report

8. Know the support hours, and who to call if you need assistance

9. Remember that not all calls will result in a message

10. Keep an eye on your usage and make sure you change plans if you are under or over your allowance

11. If you're expecting a spike in volume, make sure you give the call center at least 14 days lead time so they can properly staff

12. Scripts are never static and can always be tweaked, so don't think you're stuck

13. Know the technical capabilities of the call center, like what software they integrate with, and use that to your advantage

14. Don't be afraid to implement an IVR to improve customer service and cut down on live operator talk time

15. If callers ask for specific people, it's a great idea to have those as paths in your script

16. Schedule a meeting with your call center periodically to have them review your script and propose improvements

17. If you're using a PBX to route your calls to the service, make sure calls aren't getting stuck and not reaching the service, or bounced back if the service is experiencing high call volume

18. If you add temporary instructions to your script, make sure you contact the call center to remove them

19. Call centers will often have several different billing options, like per call, per minute, or dedicated agent. Make sure you know all of your options.

20. Add a cell phone number in addition to any email address to make sure you're getting all messages

21. Call center invoices can be confusing. Ask for a sample before you start

22. It's great if your call center offers Spanish operators, but it's not always a necessary expense

23. Make sure everyone in your office knows how to forward and un-forward their calls

24. If you plan on advertising a number, find out if you can take it with you.

25. If your call center has a portal, use it

At SAS, we understand the call center industry. We live it every day. We know how rewarding it is to have a call center working for you seamlessly in the background, and how frustrating it can be when things aren't going 100% as planned. Outsourcing should never feel like it's causing more stress than if you were to answer your own calls.

To make sure every small business and entrepreneur we answer for is able to get the most out of their outsourcing experience, we came up with 25 points you should consider as you're working with a call center.

To come up with this list, we interviewed key people in our call center organization to get their opinion.

From the sales team, we learned the frustrations sales prospects have with their current providers.

From our operators, we learned about the struggles they have when managing accounts that are either too mechanical, too complex, or even too simple.

From our customer support team, we learned about some of the challenges customers face and the solutions our support team delivers to our client base to overcome those challenges.

While every group had their own perspective, the overall theme was about the partnership between the client and the call center for continued success.

Communication is key and understanding the limitations of the call center are essential to building a foundation of success.

Tip #1:

Review and rate your calls on a weekly basis

Small businesses are focused on 1,000 things on any given day, and they may fail to understand that their call center is like an employee that needs to be monitored.

Barb Albert
the customer service support manager at SAS knows

"A successful outsourcing experience means you're getting the most out of your call center. Do do that, just make sure you're following the 4 commandments:

-Listen to at least 1 call each week

-Rate at least 1 call a week

-Provide feedback if necessary

-If there are problems, repeat each week

-If everything sounds and looks good, repeat each month

WEEK 1

WEEK 2

Tip #2:

Give input when customizing your script, but rely on the experience of your customer support rep to finalize the account

George Nave

Vice President of Sales at SAS, explains

"The key to a healthy script is to follow the advice of the experts. We're in this game day in and day out, and we know what will work and what will be a complete disaster. When I'm working on a client's script, I'll listen to their needs, merge that with what will work in our world, and meet in the middle with a bulletproof script."

In other words, you know what works for you, the call center knows what works in their environment, and you need to combine both worlds to develop a great experience.

Tip #3:

Understand that there will occasionally be hold times

In a perfect world, hold times wouldn't exist. While no business can guarantee a perfect answer rate, a good call center will have systems in place to help cut down on hold times to make sure your callers are getting helped as quickly and as efficiently as possible.

Mollie Williams

one of our support superstars at SAS, explains how

"many people, if not most people, expect to be put on hold from time to time.

However, see if your call center can implement some features to make the wait time more bearable. For example, here at SAS we can add custom greetings so callers know they've reached the right place, and custom hold recordings that can play to let callers know there is an unexpected hold, but that someone will be with them shortly.

We find that adding these features helps alleviate any frustrations and encourages callers to stay on the line."
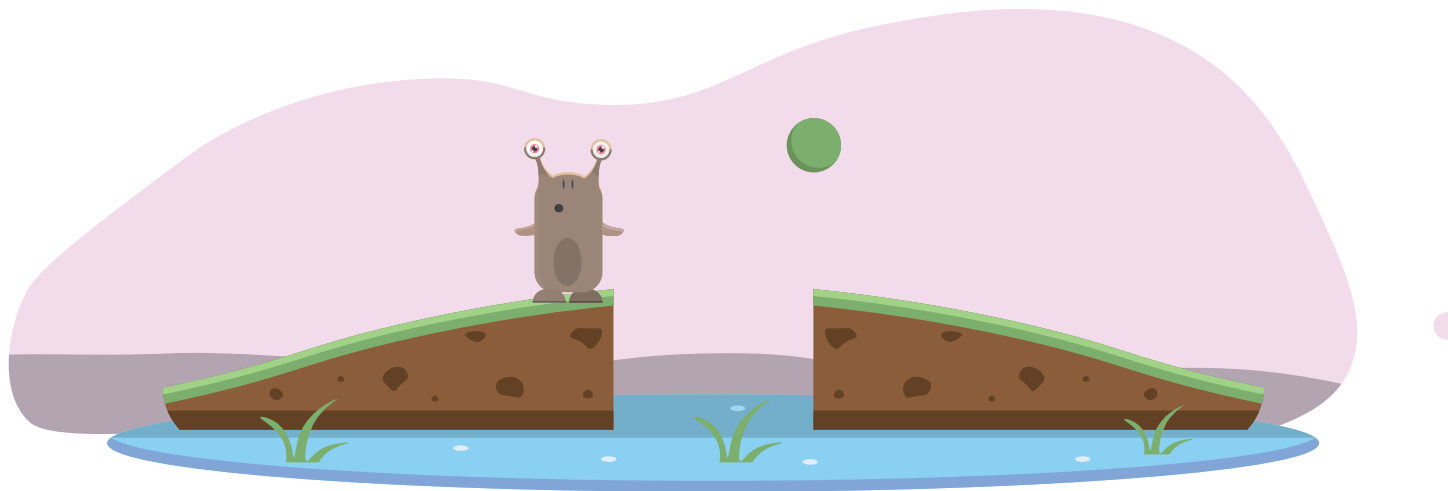
Tip #4:

Let the call center reps be honest with callers, and let them know they work in the call center

Josh Middlecamp

an SAS sales rep, explains that

"I try to be as honest with our clients as possible, and sometimes that means laying things straight out on the table. When people outsource, they expect that the agents handling their calls will be able to handle them the exact same way their in-house staff do, and that's just not possible all the time.

That's why I always suggest our clients be upfront with their callers and have the agents say that they've reached the call center instead of trying to play it off like they are in the

I find that when callers know exactly who they are talking to, their expectations aren't as high, and therefore they aren't as upset when they eventually come to realize they're not speaking with someone in the office."

Honesty is key, and your callers will be much more appreciative if you are up-front about outsourcing to a call center than trying to brush it under the table.
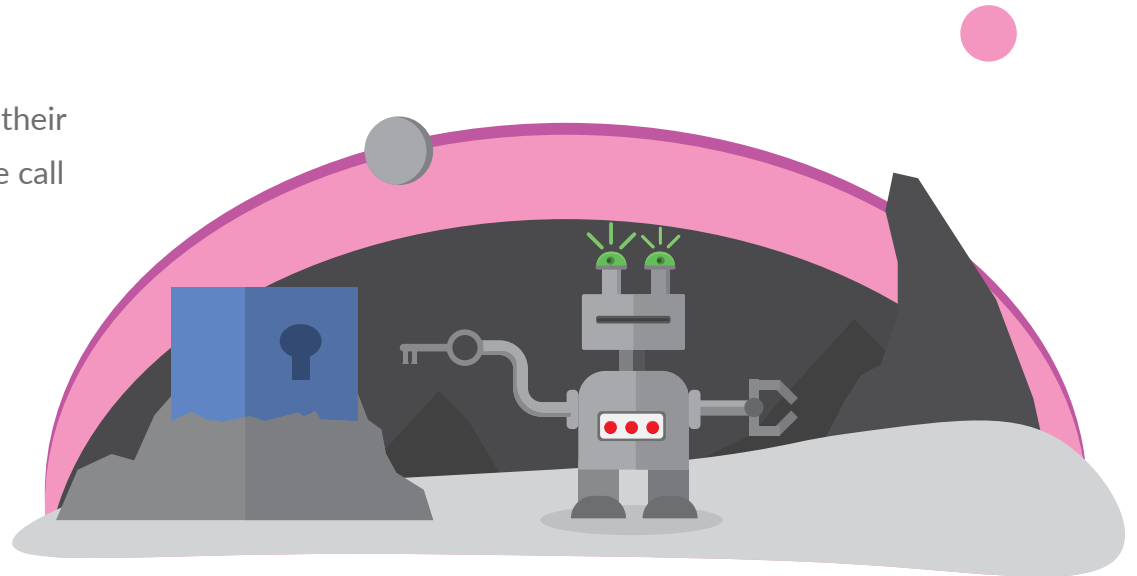
Tip #5:

Keep your information current, like on-call data, emails, and phone numbers

Esther Cardin

SAS sales rep, explains that

"one of the most important pieces of advice I try to give customers is to make sure your call center always stays current with your in-house business practices.

That means if phone numbers, emails, staff, pricing or protocols are changing, your call center needs to know. Otherwise, your customers may be given wrong information or we could be sending messages to the incorrect places, and no one will be happy!"

Tip #6:

There's a perfect amount of FAQ data you should enter, and you need to find that

When outsourcing to a call center, you need to find the perfect amount of information to provide. You don't want to do too much, and you don't want to do too little.

Danielle Viglione
a customer service representative at SAS explains that

"a lot of our clients tend to 'over arm' their operators with frequently asked questions, which can sometimes get a bit messy. While you do want the agents answering your calls to be knowledgeable about your company and be able to answer questions, it's not realistic for them to be able to answer everything. Here are a few of my tips when it comes to FAQs:

-Don't add more than 20 FAQs (15 may even be pushing it)

-Keep them short, and don't add paragraphs of information!

-Organize them to keep similar questions together. For example, pricing questions should be grouped with pricing questions and service questions should be grouped with service questions."

Tip #7:

## Customers tend to exaggerate hold time experiences. Trust the report

Sheila Forth

the Assistant Support Manager at SAS has been in the call center game for many years, and offers her own advice when it comes to hold times:

"It's no surprise that people don't like waiting on hold. However, callers sometimes exaggerate the time they actually spent on hold, which causes a stir with our clients. Through our system we are able to run hold or answer rate reports on particular lines that show exactly how many calls came in, and exactly how long they were waiting (if they were waiting) on hold.

When we run these reports, we typically see that the hold was not nearly as long as originally reported ('I was on hold for 5 minutes' usually equates to 30 seconds). However, whenever there are holds we have measures in place to help combat them, like adding custom hold greetings or changing operator distribution."
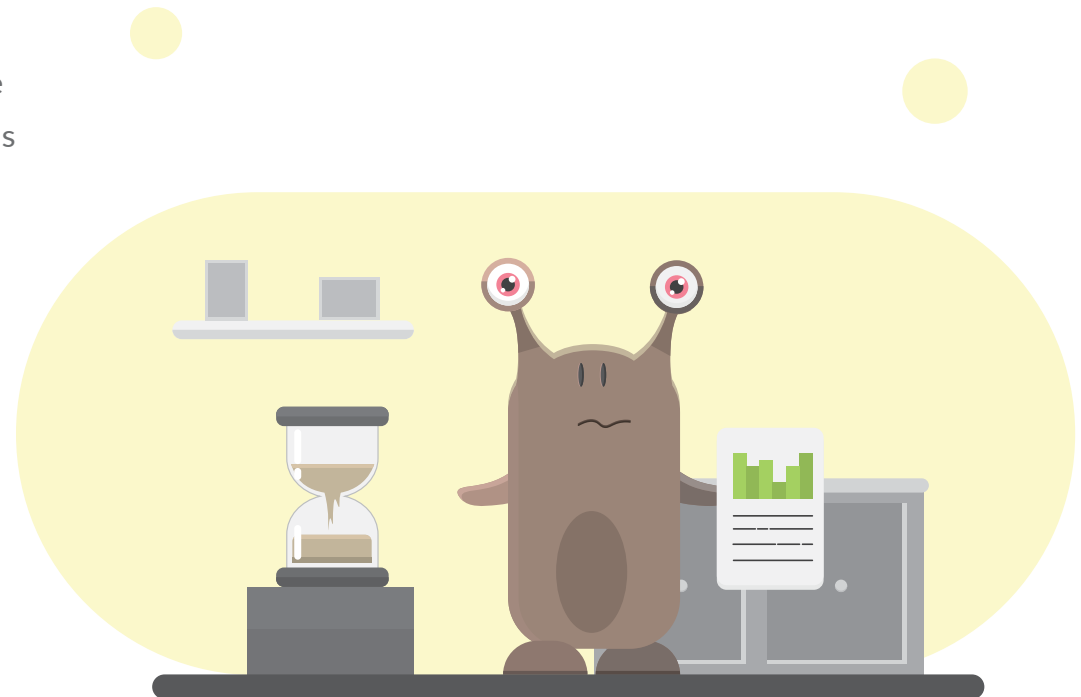
Tip #8:

Know the support hours, and who to call if you need assistance

Whenever your business is working with a third party company, like a call center, it's important to know who to call when you need assistance and when.

Courtney Pizzi
from the SAS support team says that

"a good customer service team is crucial when finding the perfect call center to outsource to. They should be knowledgeable, easily accessible, and above all, friendly. Working with a customer service team that seems aloof to your problems is not going to allow your business to grow and thrive."

If your call center's customer support team isn't able to be available 24/7, they should offer some sort of middle ground. For example, if they don't offer phone support over the weekend, they should still be accessible via email or chat. Or if they are all busy on the phone, they should have a system in place to have the calls route to the call center to have an operator create a support ticket.
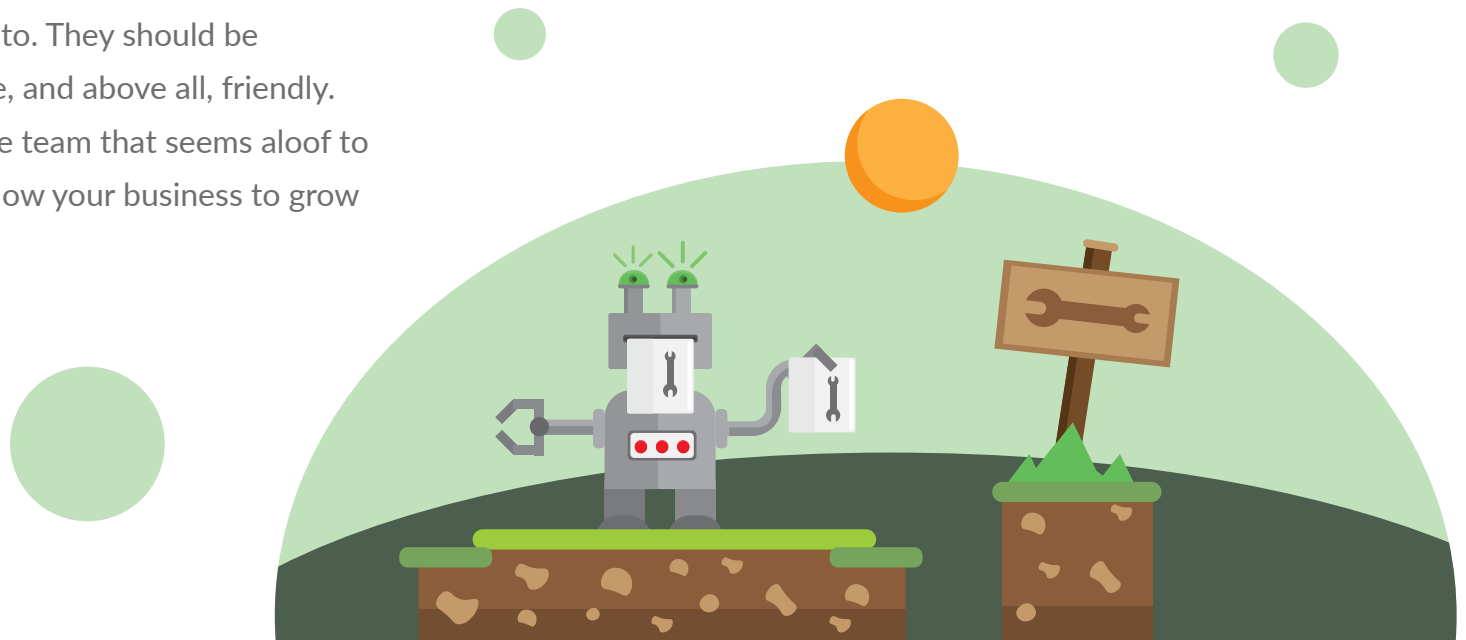
Tip #9:

Remember that not all calls will result in a message

Just like you don't take messages for every call that comes in in your own office, your call center won't take messages for all calls, either.

Kathy Galdi
a long time sales rep at SAS explains that

"there are many calls that come in that simply don't require a message being taken, like wrong number calls, or calls where the customer has simple questions that the operator is able to answer using your FAQs.

So, don't be alarmed when the number of calls that comes in doesn't match the number of messages you are receiving!"

If you do have concerns that you aren't getting all your messages, your call center should be able to provide reports that show you those details, or provide you access to an online portal that you can log into to view all the messages and run reports yourself.
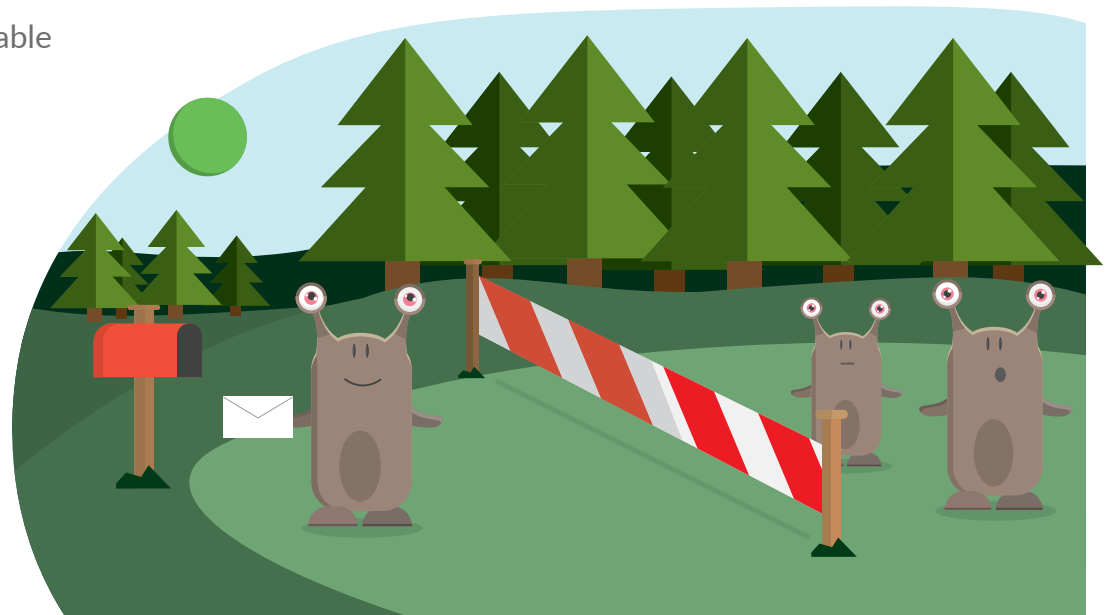
Tip #10:

Keep an eye on your usage and make sure you change plans if you are under or over your allowance

Like cell phone companies, most call centers offer multiple pricing plans that can be scaled to match your business.

Kelly Dunbar
a customer service rep at SAS explains that

"making sure you are always on the right plan is important, especially for small businesses. Our plans here at SAS can be increased or decreased any time in the month to make sure our clients are always on the right plan. We even help monitor usage for them and send out alerts if they should be on a higher plan."

Customers who know their service is looking out for them will appreciate the vigilance, and will be grateful for all the money they'll wind up saving in the long run.
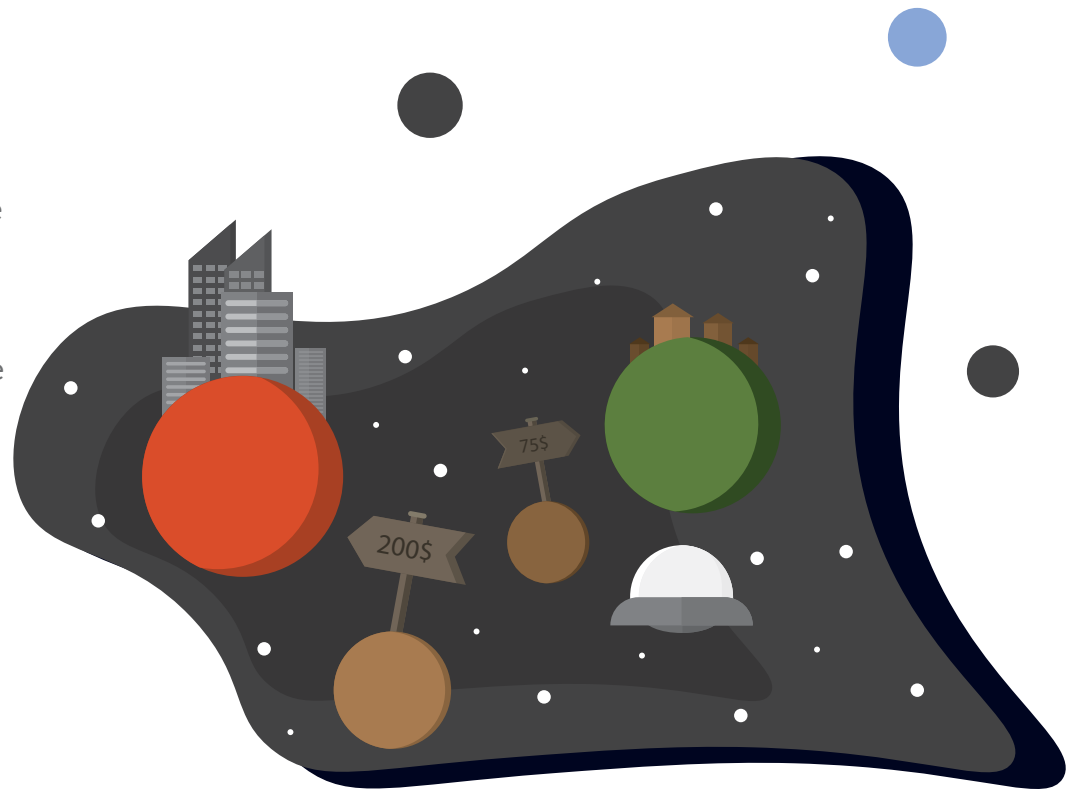
Tip #11:

If you're expecting a spike in volume, make sure you give the call center at least 14 days lead time so they can properly staff

While no call center (or business for that matter) can guarantee there will never be holds, you can help your call center service cut back on queue times by letting them know in advance if you're expecting a spike in volume.

Kaila Hamaday

SAS support rep provides some great examples:

"If you're airing a telethon or a new campaign in a month, let your call center know as soon as possible so they can make sure they are staffed accordingly. If you blindside your call center, they won't have ample time to prepare, and your callers, as well as many other callers, will suffer the consequences."
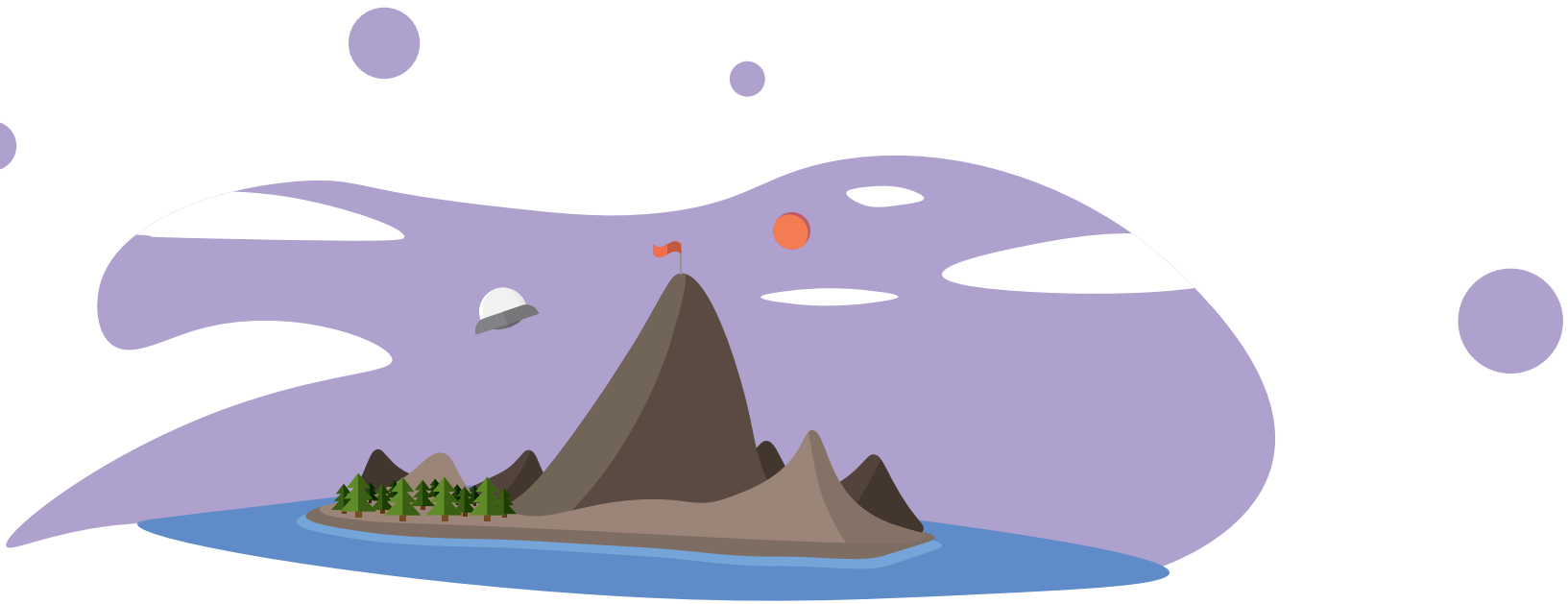
Tip #12:

Scripts are never static and can always be tweaked, so don't think you're stuck

Matt Baker

Intake specialist for SAS has a lot of experience talking with potential customers and setting up accounts. He explains that

"call center scripts are never set in stone. Just like practices and protocols in your own office can fluctuate, your call center can change with you. Any time you need to make an update or tweak a procedure, your call center can work with you to make sure all systems are running smoothly."

It's also great to get feedback from your call center, because what works in your office may not work with your service. So, if your support team doesn't think a certain procedure or update would work, they can provide alternate recommendations so that both sides can come to a happy medium.
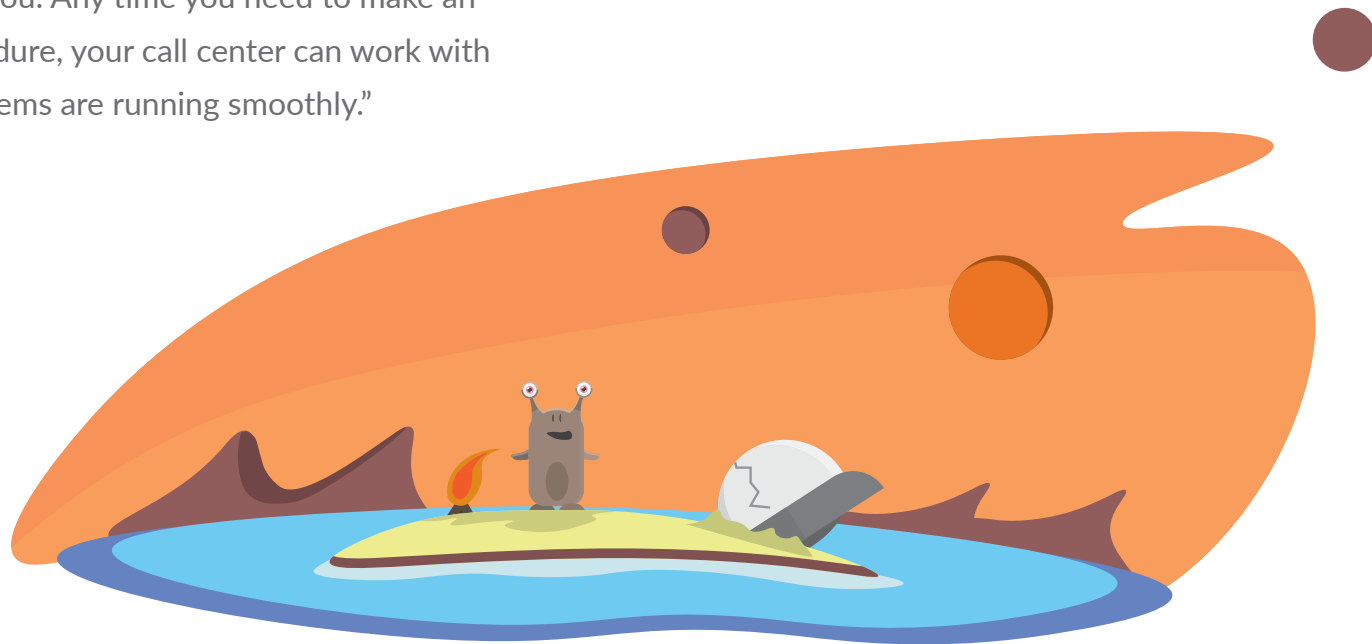
Tip #13:

Know the technical capabilities of the call center, like what software they integrate with, and use that to your advantage

Before you sign up with a call center service, it's important to know what they're capable of. For example, some call centers may offer basic services, whereas others may offer more advanced features.

Chris Middlecamp

SAS sales rep explains why it's important to take advantage of the services your call center offers:

"To put it simply, call centers exist to help take some of the burden off of business owners and their employees by alleviating the day to day responsibilities that tend to stack up. So, when call centers offer advanced features like the ability to integrate with software you're already using, or the ability to schedule your appointments for you, the best thing you can do for your business is to take advantage of those tools. The more tasks you are able to outsource to your call center, the easier your life will be."

INSTALLATION
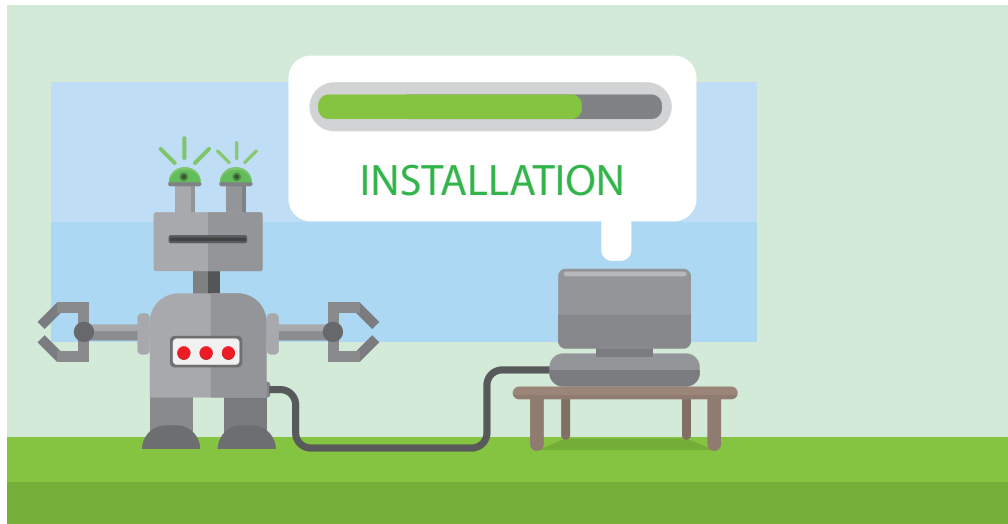
Tip #14:

Don't be afraid to implement an IVR to improve customer service and cut down on live operator talk time

When outsourcing to a call center, the customers' experience is most important, which is why it can be helpful to implement an IVR or an auto attendant.

Mike Danaher

from SAS's programming team explains that

"while your business shouldn't rely on automated support, it can be a great addition to your arsenal of support tactics. IVRs can help answer simple questions, route callers to the appropriate person or department, and ultimately cut down on live operator talk time. IVRs are also a great way to provide your callers with simple information like updated business hours or a new address, which may help cut down on the amount of calls coming in."
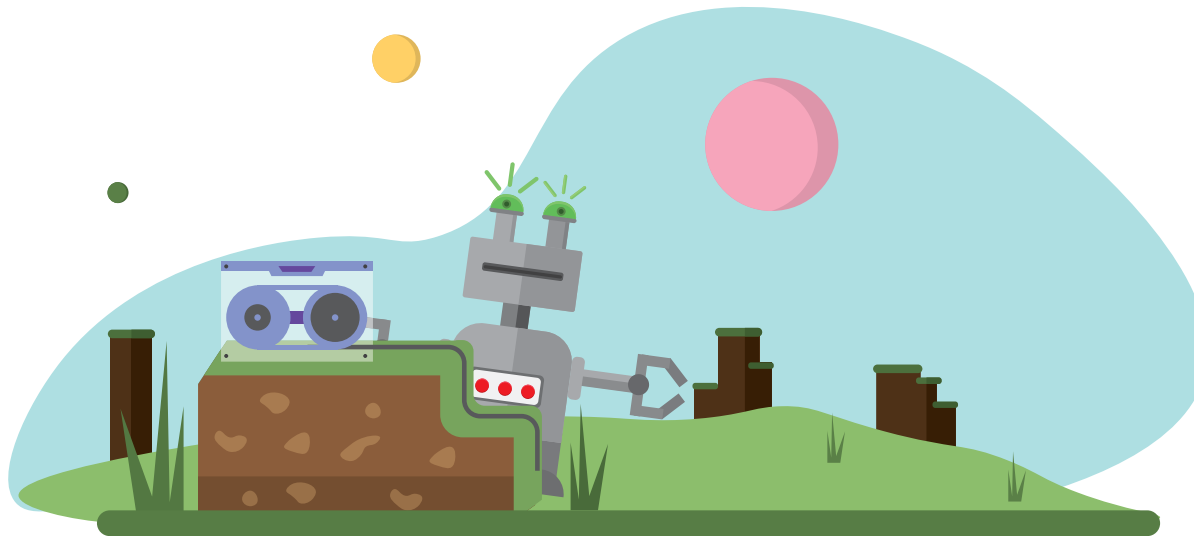
Tip #15:

If callers ask for specific people, it's a great idea to have those as paths in your script

When it comes to your call handling, thinking about and planning for different scenarios is important.

Hector Villapudua
One of SAS's programmers explains that

"just like you would have different protocols set up in your own office for different types of calls, your call center should be prepared as well. For example, when callers ask to speak with specific people from your company, have your call center program in a path specifically for those calls so that your operators can handle them differently. Even if your protocol stays the same, having a list of specific people will help your agents become more familiar with your company, and will allow your callers to have a seamless customer
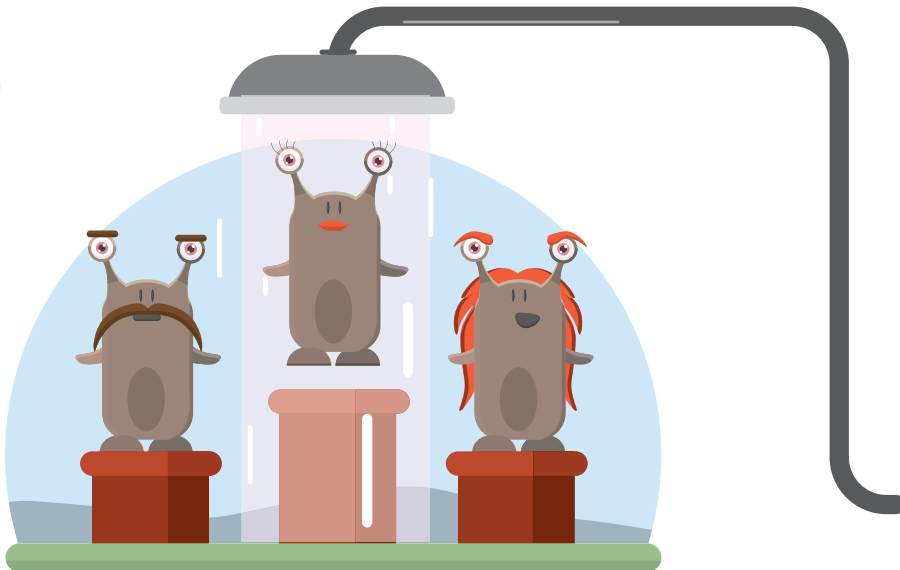
Tip #16:

Schedule a meeting with your call center periodically to have them review your script and propose improvements

In order to ensure the best outsourcing experience, you always want to make sure you're on the same page as your call center.

Matt Cohen
SAS Sales rep suggest that

"scheduling monthly meetings with your call center's customer service team is a great way to go over any issues, tweak your script, and bounce ideas off of each other to set up the most efficient process as possible."
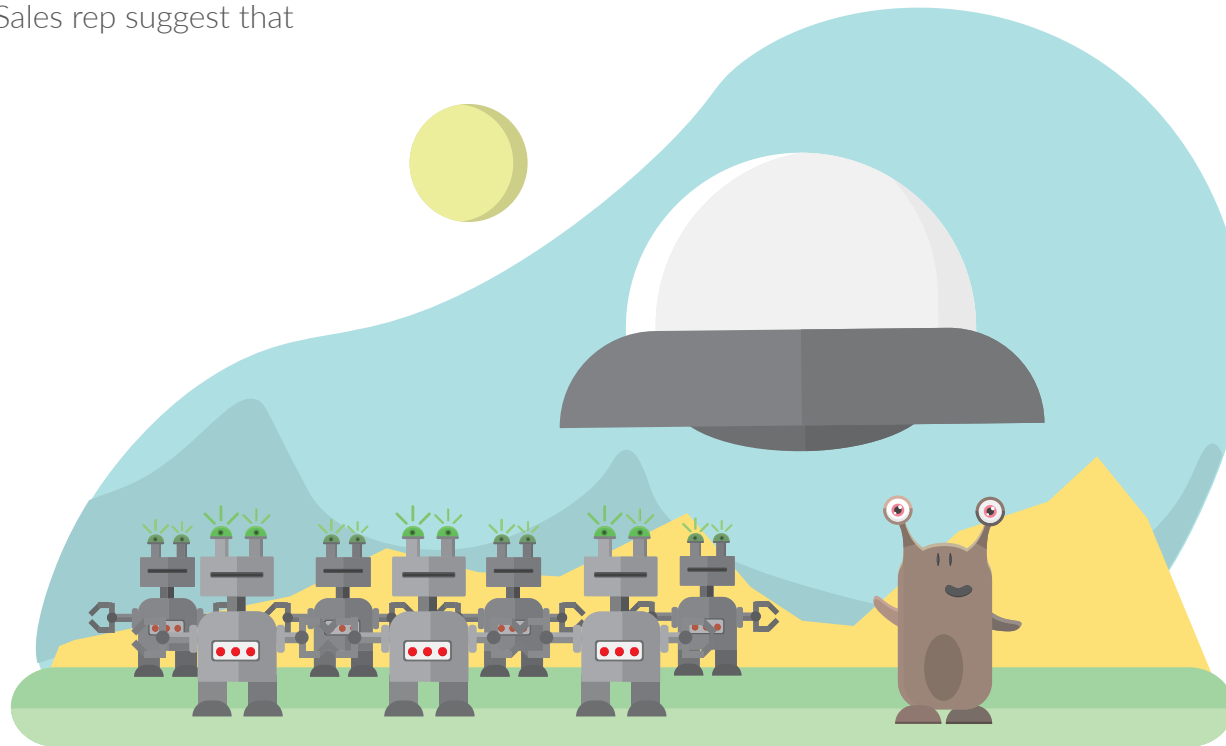
Tip #17:

If you're using a PBX to route your calls to the service, make sure calls aren't getting stuck and not reaching the service, or bounced back if the service is experiencing high call volume

When outsourcing to a call center, it's important to make sure your calls are actually reaching the service. Otherwise, what's the point?

Kevin Kozeniewski
Sales Manager and programmer
 encourages customers to

"place test calls every time you route your line(s) to your service to ensure that calls are getting through. Otherwise, customers may get stuck in limbo and fail to reach the service, or calls may wind up bouncing back to your own line. And, if your line is forwarded, customers may find themselves going in circles which is very frustrating!"
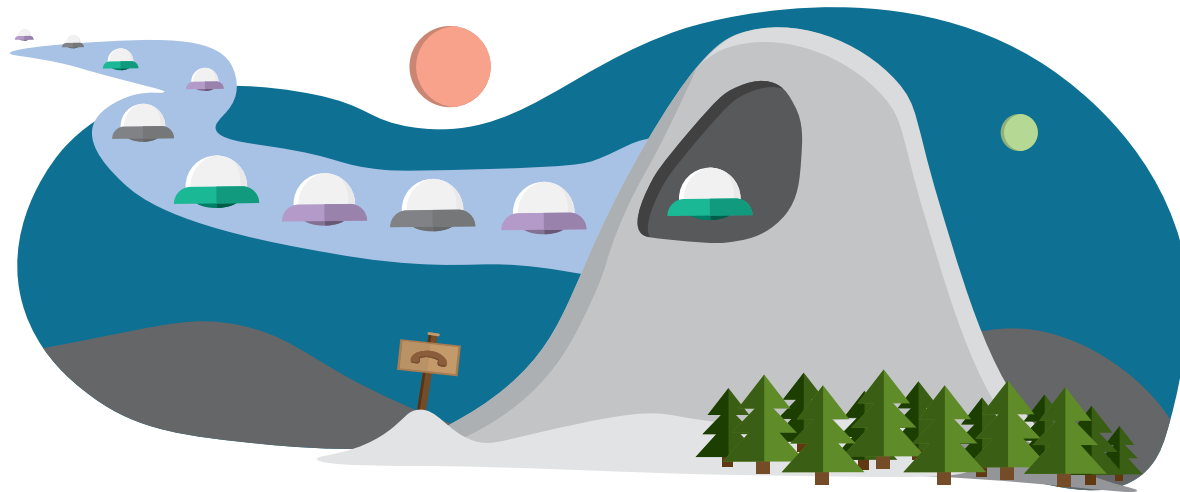
Tip #18:

If you add temporary instructions to your script, make sure you contact the call center to remove them

If your office is closing for a holiday, a company wide meeting, bad weather, or just because, it's important to let your call center know of any temporary instructions you need implemented. However, it's just as important to contact customer service afterwards to remove them, or else your operators will continue relaying incorrect information to your callers.

"when contacting your service, see if they can make programming updates that can be automatically removed after a certain date or time so you don't have to worry about reaching out afterwards. We can do that here at SAS and we find that it makes both jobs – ours and our clients – much much easier."

Jessica Rosado

SAS support rep suggest that
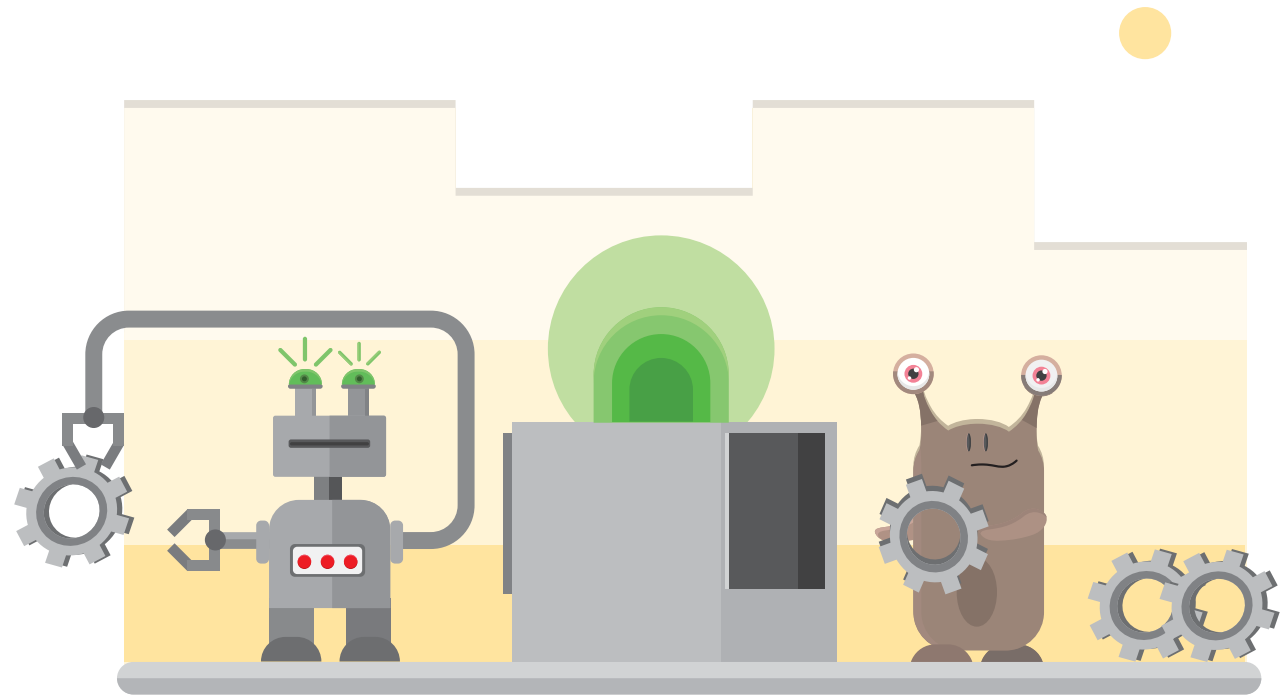
Tip #19:

Call centers will often have several different billing options, like per call, per minute, or dedicated agent. Make sure you know all of your options

Annie Baker

SAS's billing manager explains that

"many call centers offer different types of billing options, so it's important to know which route to go for your business. Some businesses may save more money on a per-minute billing system, whereas others may save more on a per-call billing system. Trying out different service levels will be the best way to determine your average call volume, which will help you decide which system would be most cost effective."

For larger businesses that need a more hands on approach, many call centers also offer dedicated agent services which while more expensive, may wind up evening out for you in the long run.
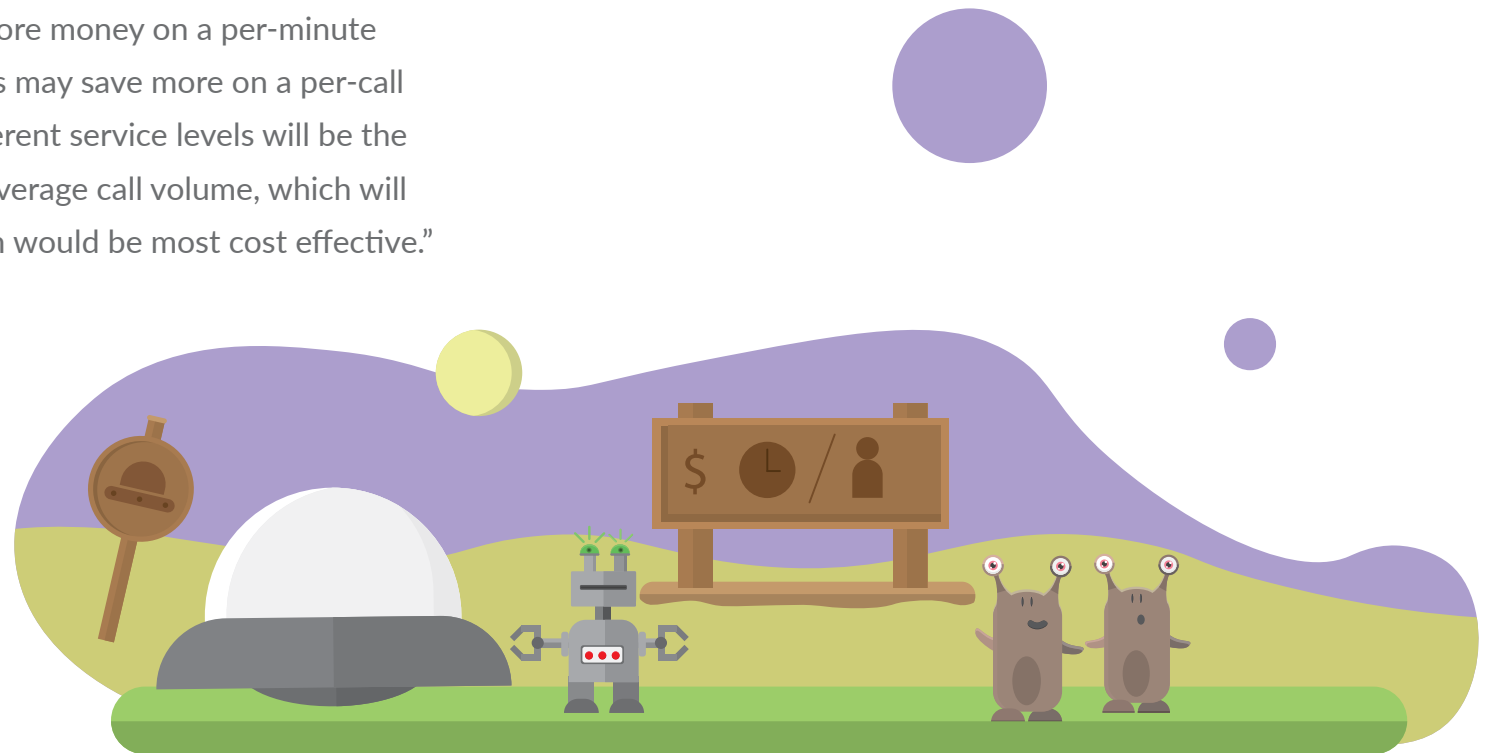
Tip #20:

## Add a cell phone number in addition to any email address to make sure you're getting all messages

In order to ensure you're receiving all of your messages no matter where you are, have your call center program your cell phone number in addition to your email address so that you can receive messages via text and email.

"having multiple messaging options set up ensures that you'll always get your messages no matter where you are, which is great for business owners and staff members who are always on the move, like HVAC techs, doctors and lawyers."

Alex Scalfaro

SAS support rep suggests that
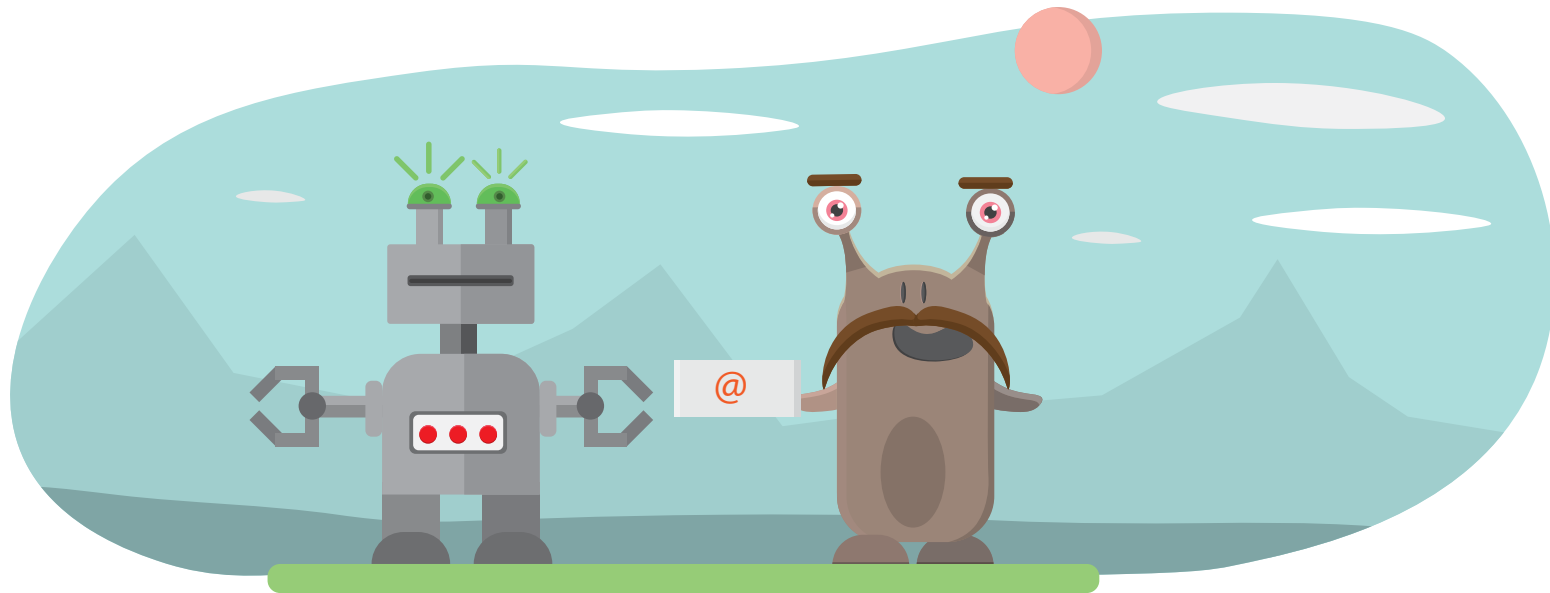
Tip #21:

## Call center invoices can be confusing. Ask for a sample before you start

Before you sign up with any service, it's a good idea to get a feel for how they invoice, so that you won't be hit with any surprises later down the line.

Taylor Blair
SAS's accounting manager, explains that

"like cell phone bills, call center invoices can sometimes be confusing because they typically bill the upcoming month's base rate in advance, and then any overages you accrue from the previous month in arrears. So, your invoices each month may look different depending on which plan you choose and how much usage you actually get. If you can, ask your call center to send you a sample invoice before you sign up so that you'll know what to expect before you start paying."
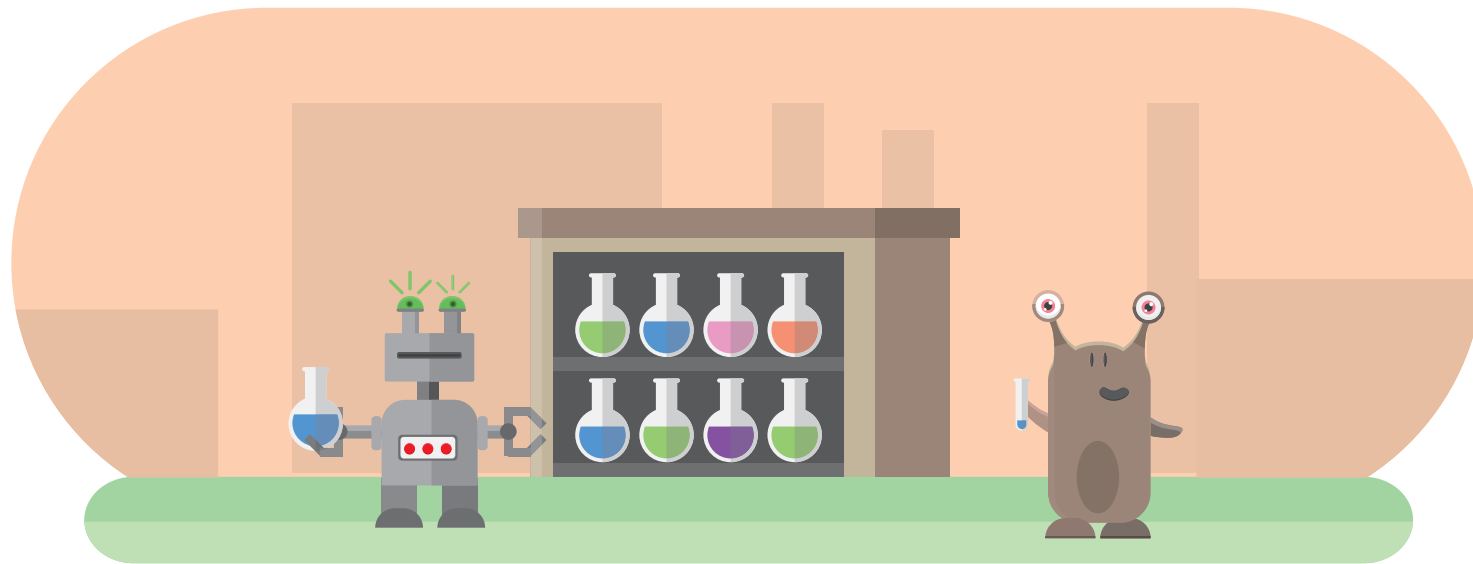
Tip #22:

It's great if your call center offers Spanish operators, but it's not always a necessary expense

Todd Cardin

co-owner and CEO of SAS explains that

"bilingual support is an ever increasing necessity for all types of businesses, so a call center that offers Spanish-speaking agents is great. Being accessible to customers of multiple languages helps open up your business to a larger audience, and allows your brand to be more inclusive.

If you're just starting out or if your business doesn't really get a lot of Spanish speaking callers, it's not always a necessity, especially if you don't have extra funds in your budget to spend. However, if your situation changes, it's good to know that your call center at least offers bilingual support as an added feature."

Tip #23:

Make sure everyone in your office knows how to forward and un-forward their calls

David Stoltz

CTO and tech guru of SAS illustrates the importance of making sure everyone in your office is familiar with call forwarding:

"In order to ensure a successful outsourcing experience, everyone in your office should be on the same page when it comes to call forwarding.

That means everyone should know the forwarding number your call center provided you, and everyone should know how to forward their calls to it. If the job of forwarding calls every evening falls on one person, your team is going to be frenzied if that person calls out sick. When everyone knows the number and procedure, you'll be able to transfer calls from your business to your call center smoothly and without any interruption."
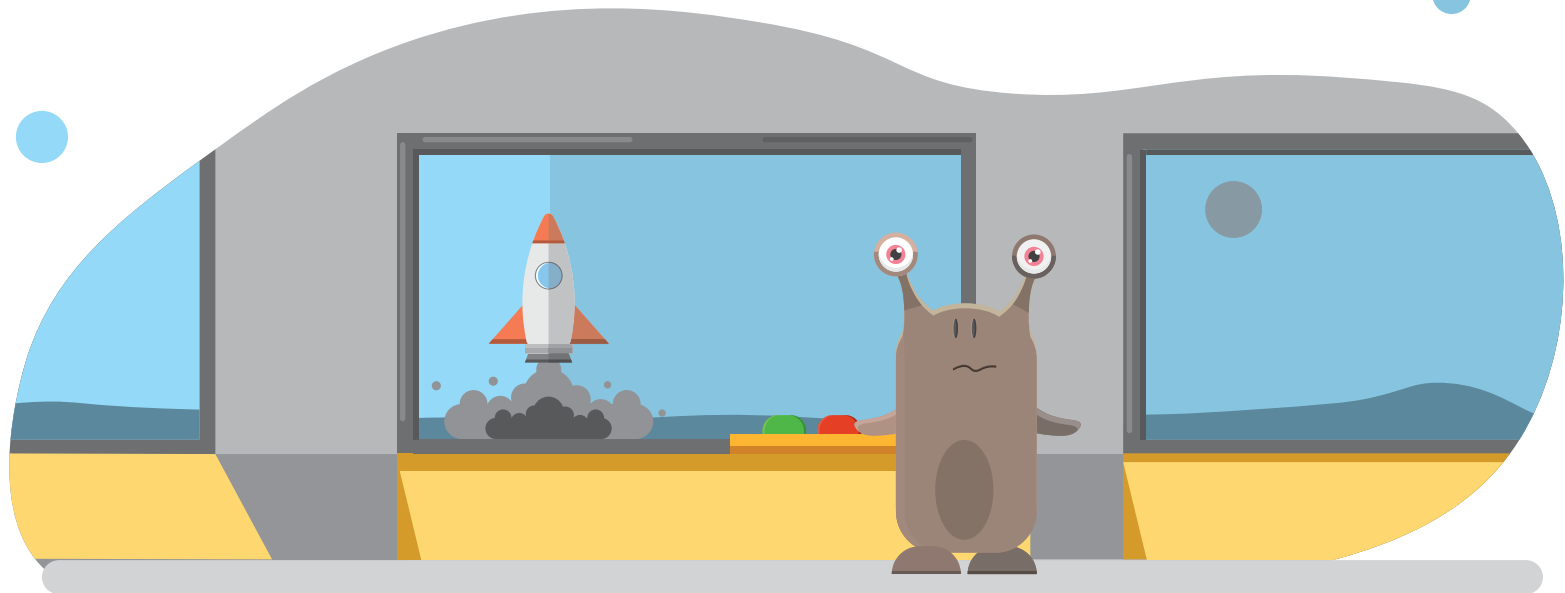
Tip #24:

If you plan on advertising a number, find out if you can take it with you

When you start using a call center service, they always provide you with a number that is specific to your account. While most businesses choose to forward their current phone lines to that number, other businesses opt to advertise the number separately on their website, business cards, etc.
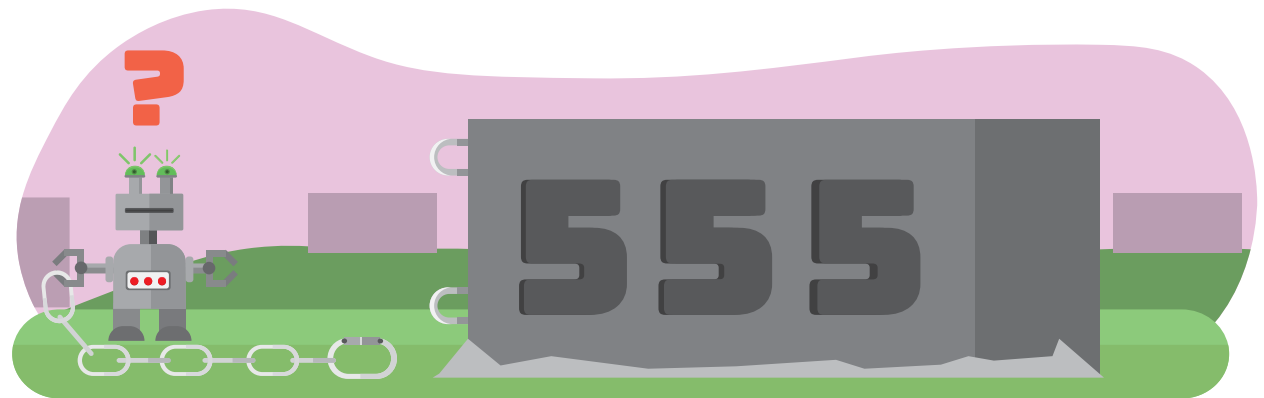
However, if you plan on advertising your call center number instead of forwarding to it,

Stephen Wildemann

from the SAS sales team suggests that you

"should find out from your service provider if you can take that number with you if you ever decide to leave service. Many call centers do not allow you to keep the number, which is why advertising it can be tricky. If you do want to advertise your number and you aren't allowed to take it with you, I would suggest only advertising it in places that can be easily edited, like your website or your voicemail. Otherwise, you may wind up spending a lot of money to print it on business cards or billboards only to lose the number in the end."

Tip #25:

If your call center has a portal, use it

Access to an online portal is a great feature that does not come standard with every call center. If your service offers it, you should use it.

Gabby Rolette
from SAS's technical team explains that

"online portals are an advanced feature that should be designed to help your business succeed by offering various tools that you can use at your disposal.

For example, SAS's portal not only lets you listen to your calls and view your messages, but you can also rate operator performance, generate on-demand reports, integrate with various apps and make changes to your on-call schedule and script. Instead of having to reach out to your call center every time you need to make changes or to retrieve your messages, everything is already at your disposal online."

SAS helps you capture leads, keep more customers happy, and keep your costs down so your small business can grow fast. Learn more about our small business call center services.
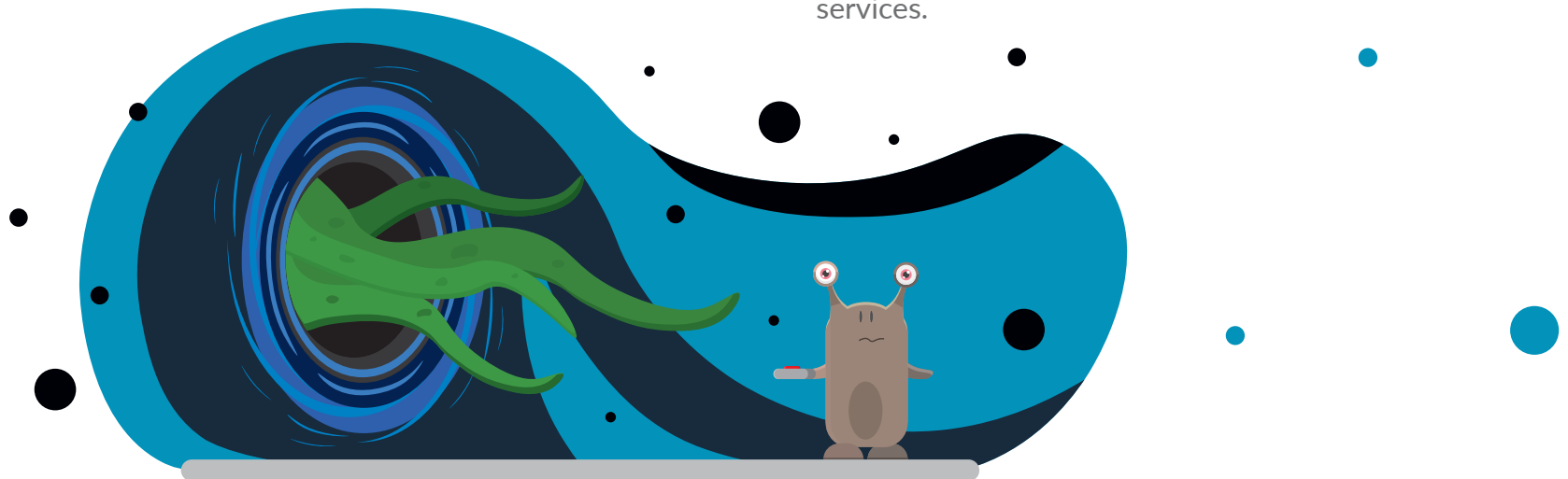
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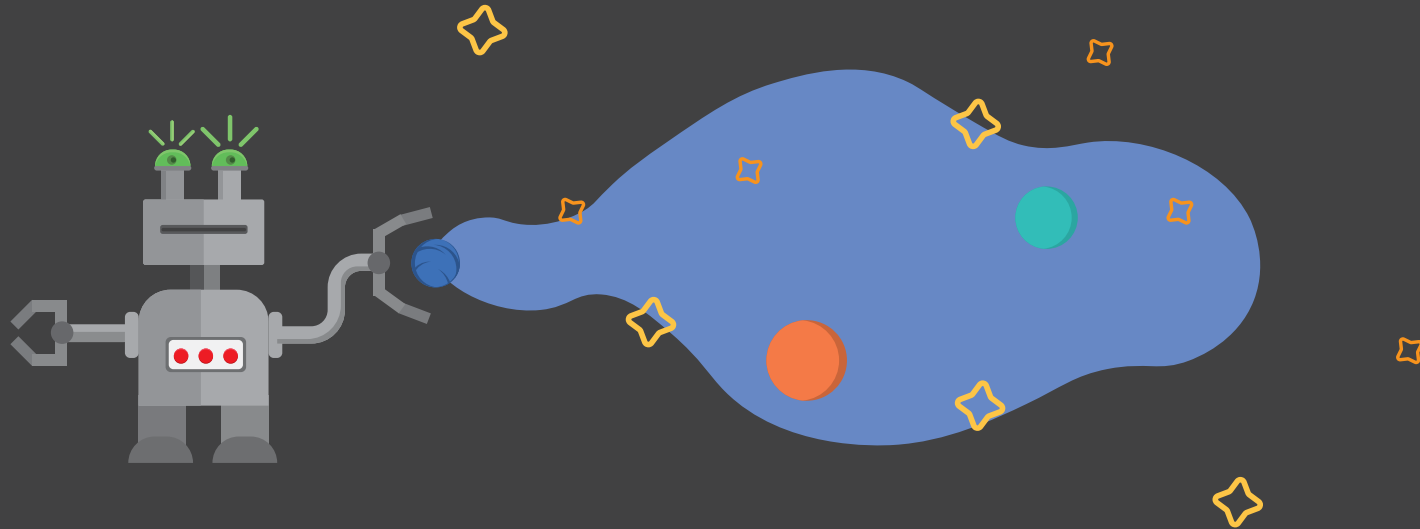
Live call center support grows brands.
24/7 live call center services let you engage with your
customers around the clock. Grow your business and
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