



BEST PRACTICES FOR CUSTOMER SERVICE GAMIFICATION

Using gamification for engagement,
better service, on the job training and more

A whitepaper by

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1. Introduction

Good customer service is at the heart of any business, and businesses that have incorporated it into their culture have exceptional results.

Gamification is the application of game mechanics – such as onboarding, points, leaderboards, narratives, and completion achievements – in order to encourage behavior. But before you imagine customer service employees robotically clicking on game-like screens, inadvertently making their roles repetitive and factory-work like, think again. Gamification – which isn't play but is rather the use of game mechanics to encourage behavior - does much more than drive achievement. It also provides customer service employees with much needed engagement, with transparency, feedback and recognition of peers and superiors, with training and best practices.

This white paper will show you how to make enterprise gamification work in a customer service environment.

1. The secret sauce of gamification

Gamification is really good at getting people to complete tasks (view a presentation, undergo training, complete details) and results in the nice fuzzy feeling of a job well done. It also works wonders in more competitive scenarios too, but only if it is tuned to balance goals and to drive performance for those employees that cannot (yet) reach the top of the leaderboard.

2. The power of automation and real time information

Let's begin with simple customer service contests. In the past, leaderboards were used - written with a marker on a board, based on managers' analysis of employee performance.

This list of "top performers" may have had some adverse unintended consequences. The underlying performance data was not transparent and therefore less credible. Those in the middle of the list: new employees and people whose results are average - may feel alienated. They also don't receive recognition, a strong driver of motivation. Worse, top performer lists are often updated sporadically. As a result there is no immediate feedback to employees, and no "feedback cycle" was created.

Using enterprise gamification has none of the adverse results and many benefits:

- **Objective data:** As you can guess from the title of this section, enterprise gamification is based on data collection from enterprise sources. This has many benefits, one of which is that employees perceive data as objective and transparent.
- **Frequent updates leave room for growth:** automatic updates can be used to provide periodic leaderboards and other gamification feedback mechanisms. Whether these occur on a daily or weekly basis, they give constant individual and team based feedback. They also leave hope for change – "if I didn't do well today, I can do well next week".

- **Many opportunities for recognition:** never underestimate how important recognition is for the happiness and engagement of employees. Gamification can single out top performers in certain segments, people who've progressed relative to themselves, top teams and more. All in all, this gives the feeling that employee performance is noticed and appreciated.
- **Gamification creates a sense of mastery:** mastery is the feeling that "I am getting better at this" – a sense of progression that is provided by result tracking and comparisons that are inherent in any gamification solution.
- **Gamification is simpler for managers:** gamification is integrated into enterprise apps, making the use of any game mechanic simpler and more streamlined for managers. It also gives them accurate information about all employees – a single source of truth for performance tracking.
- **Gamification motivates everyone:** employees can work against personal benchmarks, get recognition based on their relative improvement, earn points for completing training tasks and more.
- **Gamification provides clear calls to action:** by integrating with enterprise apps it not only gives employees immediate feedback on performance, but also tells them what should be done next
- **Gamification drives compliance and best practices:** completing fields and adding information can be gamified too, helping employees understand what they are expected to do and how.
- **Training:** elearning is on the rise and for good reasons. Rather than shuttling employees to training classes, gamification can be integrated with on the job training that is exposed to employees during quiet times or when their performance falters (as a way to earn points).
- **Gamification drives balance:** customer service employees need to balance conflicting expectations – resolve issues fast and get high customer satisfaction ratings. By tracking many service elements and highlighting the need to improve some and balance them, employees can do a better job at balancing their work – balance short handling times while still resolving customer issues (or else AHT goals can be made by "gaming" the system and not trying to resolve customer issues). Additionally, game rules can be altered to provide diminishing returns on high AHT achievement to make the employee focus more on FCR, for example.

3. Choosing the right game mechanics

Choosing the right metrics for measurement and the right game mechanics is crucial.

The wrong metrics can lead to disastrous results. Focusing on AHT alone can lead to dropped calls, but the right metrics can lead to the right results.

The key drivers for gamification should be:

- Improving employee retention, engagement and satisfaction
- Driving skill acquisition so that employees can move across all customer service channels – from social through chat, email and phone
- Reducing average handling time, increasing first call resolution and improving customer satisfaction; and
- Increasing the use of best practices through training and communication

Game mechanics used should be a combination of:

- Competition – on a team and individual basis, with benchmarks and averages rather than comparison to named individuals (compete vs the self and not vs a mindless leaderboard)
- Completion satisfaction relating to carrying out software related tasks and the like
- Task completion, point collection and quizzes for training and eLearning tasks
- “Karma” points and expert badges for knowledge collaboration

Before deciding what to measure and gamify, deep thought needs to be given to employee classification so people enter the game in a fair way that compares apples to apples. Different customer service channels have different attributes and different training requirements. Take care to compare employees by cohort and channels, so they will be playing the game against people like them. This is doubly important when leaderboards compare the employee to a group benchmark: don't set the benchmark at an impossible place, since that may be discouraging.

4. Choosing the right metrics

All contact center activities can be broken down into three basic elements:

- Measuring how quickly an issue is resolved (AHT + customer satisfaction)
- Measuring how accurate that resolution was (FCR + customer satisfaction)
- Ensuring self-reported customer satisfaction is high

Each metric measured should be reported to the employee using the gamification app (typically as a gauge or light, depending on the gamification's narrative theme).

- 1.1. Kudos or CSAT can be measured and communicated to the employee, as a form of feedback – emphasizing the reward of being of help
 - 1.2. AHT - Average handling time
 - 1.3. FCR – first call resolution
 - 1.4. Accurate entries into ticketing system or any other core customer service application
 - 1.5. Answering through the right customer service channel
 - 1.6. Learning activities completed through on the job training – in terms of material completion, quizzes and even team learning tasks
- Entries into knowledge management systems: In order to improve the resolution rate and FCR, organizations focus on creating knowledge base for popular cases, the creation of FAQs and more. This is a never ending process. Most organizations would love to harness the employees' experience while closing cases - and have them update/create their resolutions for future cases. Some employees aren't up to the effort and don't feel rewarded by it. Gamification for knowledge collaboration recognition can provide a strong solution for this problem.

Remember the importance of mastery, a sense of control and recognition. Take care to answer the question – “Am I getting better at this?” – through the use of gamification.

5. Using narratives

Using narratives in gamification can create more engaging games and capture employees’ imagination. From song contests, racing, city building and sports – narratives can be part of “weekly matches”, in which more people have the opportunity to be a winner. In some cases, employees can prepare by choosing game elements – betting on themselves and their results, doing better on certain metrics, to better prepare for the weekly match.

6. Essence and function

Customer service gamification in call centers should be much more than giving employees rewards for completing basic activities. Simplistic gamification of customer service tasks has nothing to do with delighting customers or the well-being of customer service employees.

To make this point clear, let’s explore the relationship between job essence and job function.

6.1. The difference between job essence and job function

Steve Curtin’s “Delight Your Customers – 7 Simple Ways to Raise Your Customer Service from Ordinary to Extraordinary”, begins with a distinction between two elements of work:

- Job Function: the duties or tasks associated with the employee’s job roles
- Job Essence: the employee’s highest priority at work

If you ask a waiter what they are supposed to do in their job, they will typically describe their job function: clearing tables, taking orders, serving food. Most often, they won’t mention their job essence at all. But job essence is important. In this case it is to provide service that will keep people coming back to the restaurant.

Without the focus on the greater goal – the job essence - both the customer service rep and the customer experience itself are stuck in a transactional service experience that, at best, leaves the customer unimpressed. It also causes the human provider of the service – the customer service rep - to feel their work is repetitious and unrewarding.

That’s why enterprise gamification for customer service should focus on both the job function and the job essence. Focusing on job function means tracking what matters: average handling time (AHT), first call resolution (FCR) and more. Gamification of the job function provides service reps with powerful feedback about their work and guidance how to do better.

Gamification can and should be used to clearly communicate job essence. If gamification measures it – for instance measuring positive customer feedback – it matters to employees. You can gamify those “random” acts of kindness that constitute great customer service.

Although job essence is mostly voluntary, outside the realm of the job function, relating to the anticipation of customer needs, paying attention to detail and displaying a sense of urgency, it can be gamified. Think about “karma” points for exceptional service, the recognition of exceptional service and the resulting positive communication loop that will encourage employees to go the extra mile.

What’s more interesting is that communicating job essence will make employees happier, because it attaches a meaning to what is sometimes repetitive work.

7. Gamification for task significance

By focusing on financial incentives and competition, conventional wisdom about customer service and call center gamification forgets people’s inner work life, a term coined by professors Amabile and Kramer from Harvard Business School: “People experience a constant stream of emotions, perceptions, and motivations as they react to and make sense of the events of the workday”. Inner work life is the real stuff behind a sense of motivation or a sense of disengagement.

An experiment by Adam Grant, a professor at the Wharton School of Business set out to show what happens when employees are reminded of the significance and meaning of their work.

Grant selected a university office that was tasked with contacting alumni and asking them to donate to the institution’s scholarship funds – a call center of sorts. Employees received “stories”. Some stories were about what they gain from the job – salaries, hours worked, bonuses (“personal benefit” stories). Another set of stories was about how students are enjoying the scholarships and what that enabled them to achieve (“task significance” stories). There was also a third control group that received no stories.

Employees in the “task significance” group managed to get more than twice the number of weekly pledges, doubling the amount raised for scholarships.

Take care to integrate “task significant messages – such as customer kudos and satisfaction – into the gamification communications you are using with employees. It will make a difference.

8. Communicating gamification

When you launch an enterprise gamification project, you have to create credible and repeated communications with employees. Enterprise gamification projects are an opportunity to communicate with employees about your organization’s goals, rules of conduct, expectations, best practices and knowledge base. This communication is both informative (make sure everyone plays according to the same rules) but it is also habit forming (always enter data into the system once you’ve completed a call). Not communicating an enterprise gamification project is risking its failure, as a result of too little adoption.

By setting game rules, you are really communicating with employees about the behavior you expect from them. Game rules that seem intuitive to you – even obvious – since you know what the

expectations of the organization are – may be completely counter-intuitive or unknown to your employees.

Gamification projects are typically measured on week-long intervals- in many fantasy sports and other narrative settings we recommend beginning anew each week, so that people feel they have an opportunity to do better. It therefore follows that after communicating the launch of the gamification project (including a tutorial), communication should be weekly.

Send a customized email newsletter to all game participants on a weekly basis.

The weekly newsletter extends the game experience beyond the gamified platform. It should include the following:

- **Recognition** –The newsletter should include recognition for outstanding players, competition winners and those who have improved the most during the week, relative to their past accomplishments.
- **Reminders on pending actions** –Reminders on pending actions will help the player achieve their goals in a more consistent way and assist in ensuring compliance, opportunities for success (even if there was some slack during a specific period) and to form habits.
- **Progress reports / game statistics** – people want to know how they did and how they compare to the average. Viewing personal performance side by side with team benchmarks motivates better performance. It works better than sending out lists of all people ordered by achievement.
- **Personal performance feedback** – this communication creates a routine of continuous self-improvement.

Most importantly, don't forget to celebrate winners on an individual or team basis.

9. Gamification for customer service onboarding

With so much effort put into attracting and hiring the right talent, contact center employee onboarding – the stuff that happens after the employee joins - is sometimes forgotten. But good employee onboarding is like time travel: time warps, everyone jumps over the “clueless phase” and suddenly employees know their job and do it well.

9.1. Why onboarding

Onboarding isn't only about shrinking the time it takes an employee to get to productivity and it isn't a fancy name for orientation; it reduces turnover and increases engagement since it takes the edge off those first days on the job.

Onboarding makes employees familiar with the grander corporate goals (the essence of their job: keeping customers happy) and the job functions they need to know to perform their job. It contains tasks that help the employee become familiar with the organization and their job. All this gives employee a sense of quick success and productivity.

9.2. Make onboarding easy and fun

What if you could make the employees' first days as easy and satisfying as a beginners' level in a video game?

- Think about any digital game you've ever played: angry birds, bejeweled, Super Mario. What were beginner levels like? Real easy.
- A super easy beginner level exists for two reasons.
- The first reason is to provide a quick win, which is also habit forming – you'll want to do everything to see and hear the cue that you've successfully completed a level. The second reason for easy beginner levels is less obvious: onboarding. Through each quick win, with each level focusing on one basic skill (flinging a red bird, tossing a yellow bird, catapulting a blue bird), players gain a sense of mastery, autonomy and skill.

9.3. Onboarding is eLearning

You've prepared training materials. Can't new hires just sit at a table – you'll offer coffee and cookies – and go through the files? Gamification can do much more than that. Quite a lot, in fact.

Whether they are being trained on product specs, communication channels, expressing empathy with customer issues or managing difficult callers, rote completion of learning materials is mostly partial. Gamification has surprising ROI: more materials will be viewed, and quizzes and team work can be used to show how the material is applied.

9.4. Use team gamification for onboarding

One of the best onboarding methods is to create a learning competition between teams – people at the same table, for instance. They will go through learning and onboarding together, answer questions about training materials and review each other's answers. Collaboration to increase team learning scores can easily get you to 100% completion of material review and learning tasks.

9.5. Think about continuous onboarding

No one said that contact center onboarding should end in the first days/weeks of work. Actually, many contact centers we've spoken to put new hires in the simpler, asynchronous channels (email, social networks) where the response isn't immediate. Over time people move into the channels that require more knowledge – answering calls, dealing with technical complexity. Breaking onboarding for each channel into pieces – and doing so with gamification can integrate training into the employee's workday. Using training as a pre-condition – to unlock a challenge or a leaderboard or a team contest – can do wonders for on the job training and on the job onboarding.

10. Replacing failure with training

When customer service reps have performance issues, gamification can be used to reinforce positive action. For instance, upon a failure to reach a personal benchmark (leaderboards with all employees listed, with some on bottom, are not recommended), employees can be encouraged to complete training tasks to "re-earn" missing points and stay in the game. Besides this "event-based" elearning, employees can also be encouraged to review their detailed performance report and seek improvement.

11. Conclusion

Enterprise Gamification has many advantages in the customer service sphere. It can promote a balanced approach to metrics, communicate goals and best practices and encourage learning. Moving beyond competition only game mechanics and taking care to track performance and provide feedback can improve both corporate results and employee well-being.