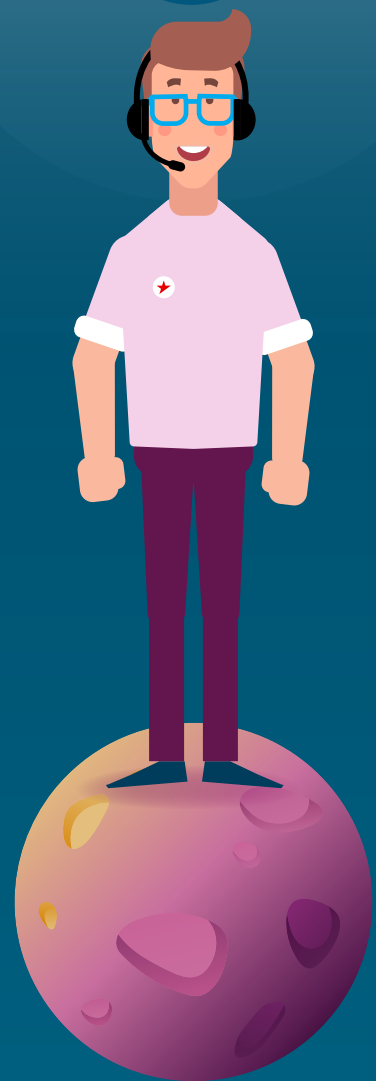


# Happy Agent Guide

How to create  
out-of-this-world  
agent pulse surveys



# This is how you create a first-class agent pulse survey

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# Welcome, pal!

## This is a guide for creators of customer service pulse surveys.

In it, we have summarized our lessons on how a good pulse survey can be created to help ensure the success of a customer service organization. The best models are always developed around the culture and goals of the particular organization. They accommodate the needs of different roles, and focus on interaction and continuous development rather than simply asking questions.

In customer service organizations, low job satisfaction and high employee turnover are major problems. A customer service representative who is fed up with their

work is rarely able to provide an excellent customer experience. In addition to the loss of expertise, the departure of a customer service representative causes resource problems and a significant increase in costs, for example in terms of recruitment and induction.

Loss of customer service employees also negatively impacts the customer experience and the motivation of the rest of the customer service staff.

## High employee turnover is a major problem among customer service reps.

Do you know how your customer service employees are coping? Why is this? What can be done about it? What are the effects of the changes?

A good pulse survey gives you a more accurate picture of the situation and helps you find the root causes that help you to correctly target resources for making improvements.

Naturally, we don't have the key to creating the perfect model, and we don't know what model is just right for you. However, we promise that this guide will provide useful insights into putting together your staff pulse survey and better developing job satisfaction in your team.

**Enjoy the guide!**

**Did you know that staff turnover has a huge impact on your customer experience and bottom line? According to a Deloitte survey, it takes about USD 12,000 to replace an average frontline person. What's your number?**

\* According to NASA, this is more than an average astronaut's monthly salary!

# Factors that cause customer service agent (dis)satisfaction

**Before thinking about measuring the agent experience, let's go through the drivers that affect well-being.**

The job satisfaction of customer service staff is affected by many factors that are common to work in any sector, such as the workplace culture, team spirit, and the quality of supervisory work. We have studied the drivers of well-being at work in customer service organizations among our customers, and have also studied the research and literature in the field.

The key drivers of well-being at work in a customer service organization are team management, training, meaningful tasks, the clarity of goals, recognition for performance, opportunities for advancement, and compensation. Below is an in-depth look at these drivers.

## Team management

If one had to choose the most important driver of customer service success, it would obviously be the quality of supervisory work.

The role of a customer service supervisor is demanding, and a successful supervisor must master both the content of the work, numbers-based management, and people management.

Management face additional challenges due to the fact that the average work experience of customer service employees is often limited.

Supervisors must balance efficiency requirements and cost pressures in the difficult terrain of the customer experience and the staff experience.

## Training

Lack of training or the poor quality of coaching is a major reason for the dissatisfaction of customer service staff. By its nature, coaching ties up resources and therefore it is essential to target it properly.

In the best organizations, coaching targets the right teams, customer service staff, and themes. The creation of content and targeting of coaching are most effectively carried out with the help of staff pulse survey data, customer experience data and quality assurance data where it is most needed.

Investing in customer service agents by offering training, mentoring or coaching is proven to enhance job satisfaction and engagement.

## Meaningful tasks

At worst, customer service is monotonous and emotionally draining work. Realizing the meaningfulness of this work to customer service representatives is central to what a supervisor does. If a customer service representative does not see any meaning in their work or feels that their tasks are monotonous, there is an increased risk that they will provide a poor customer experience, and an increased risk of customer service staff turnover.

## Clarity of goals

How am I measured? When do I succeed in my work? What kind of activities lead to better results?

If your customer service representatives do not have clear answers to these questions, the conditions for their coping at work will be significantly poorer than in a situation where customer service key performance indicators (KPIs) are clearly in mind.

Quantitative metrics are emphasized in customer service, but in the best organizations qualitative metrics, such as the customer experience, also play an important role.

## Recognition for performance

In a customer service organization, a single supervisor can often have a fairly large team, and not all good performances will be noticed. However, it is crucial for the meaningfulness of customer service work that all successes receive recognition, both by the supervisor and more broadly within the organization. Directing positive customer feedback to customer service representatives improves staff well-being and coping.

## Opportunities for advancement

With a hundred customer service representatives and five supervisors, the customer service representative may feel like they have quite a small chance of advancing.

In the best organizations, there are several levels of customer service where power and responsibility increase and the paths to progress seem clear and fair.

## Compensation

Compensation alone can't motivate your agents to do their best work.

That said, however, employees who believe they are underpaid will never embrace the attitude of going the extra mile for the customer.

It is important to understand that many customer service agents are at the lowest tier in their organization. If they are being paid only the minimum wage, the odds are that they feel minimally valued. There is a huge need to be mindful of the messages your compensation strategy is sending.

## Other drivers

Customer service satisfaction does of course depend on many other factors as well, and the key drivers vary from one organization to the next. For example, internal organizational processes play an important role in well-being at work. Work tools such as applications and equipment also have a direct impact on well-being at work, as do office conditions.

# The purpose of the pulse survey

Staff pulse surveys have become more common at the same time as the need to be better informed about the staff experience has increased.

In the rapidly changing world of work, **annual well-being surveys are no longer enough.** This is especially true in hectic customer service work.



Icon and text. This is why staff pulse surveys matter

The main goal of the pulse survey is to improve the well-being and productivity of employees by gaining a better understanding of how customer service representatives feel, and to enable employees to participate more closely in developing the work community.

Pulse surveys provide a concise and up-to-date overview of how the staff are feeling in different teams. Feedback can be used to support the right projects and learn from the best. The pulse survey helps to detect stress and problems, and provides suggestions for improving the atmosphere and work.

# Roles and motives

A good feedback model considers the motives of the different roles in the customer service organization. I recommend mirroring the staff pulse survey you create, considering the motives for the following roles:



## Customer Service Agent

Is tired of interruptions and surveys from management. Would like to focus on the essential – helping customers. Appreciates short and clear surveys. Is unsure if they dare to give honest feedback – could it affect how they are treated?

The motivation to respond to surveys is particularly low if the employee notices that responses to surveys are not used and nothing changes. On the other hand, the employee is happy if they receive support when necessary and their views are taken into account and are used to develop the organization's operations.



## Customer Service Manager

The ability to apply survey results vary widely among managers. The best managers communicate, learn, discuss, and above all develop activities with the staff based on the feedback received.

For some managers, tracking feedback is a chore. The technology is a pain, there is a fear of being thought of as a poor supervisor, and collecting feedback is considered unnecessary bureaucracy that just slows work down.



## Customer Service Director

Hopes the feedback model will provide real value for the organization. Wants the pulse survey to be progressive and something that the customer service management can be genuinely proud of. Focuses the energy of their team on the themes and units identified in the survey.

For some managers, measuring staff experience is nothing of much more importance than ticking a box and adding a couple of sentences in the annual report. Increasingly, however, senior management see the staff experience as a strategically important element, and measuring feedback is a good part of developing this experience. Senior management are interested in the correlations between staff experience and performance measures, and the financial impact of staff well-being.



# Content and structure of the survey

Pulse surveys differ from annual well-being surveys in their length and frequency.

A good pulse poll is concise. It is unnecessary to specify the exact maximum number of questions, but in short surveys of two to five questions the experience of answering is good. In addition, the analysis of the data remains sufficiently straightforward. We recommend a simple three-question model that several of our clients have found to be excellent:

1

Employee Net Promoter Score (eNPS)

2

Predefined icons

3

Open feedback

The pulse survey can also ask strategic questions, which clarify how the key goals or operating models of the organization in question are realized.

TIP

We at Surveypal have found that a well-working model is one in which, in addition to the eNPS and an icon question and open-ended question, the survey contains and is concluded by **a section where the respondent can praise a colleague anonymously**. This anonymous praise section of our monthly meeting has become popular, and works well in our culture.

# Example survey

**1**  
**eNPS**  
(Employee Net Promoter Score)

**2**  
**Predefined icons**

**3**  
**Open feedback**

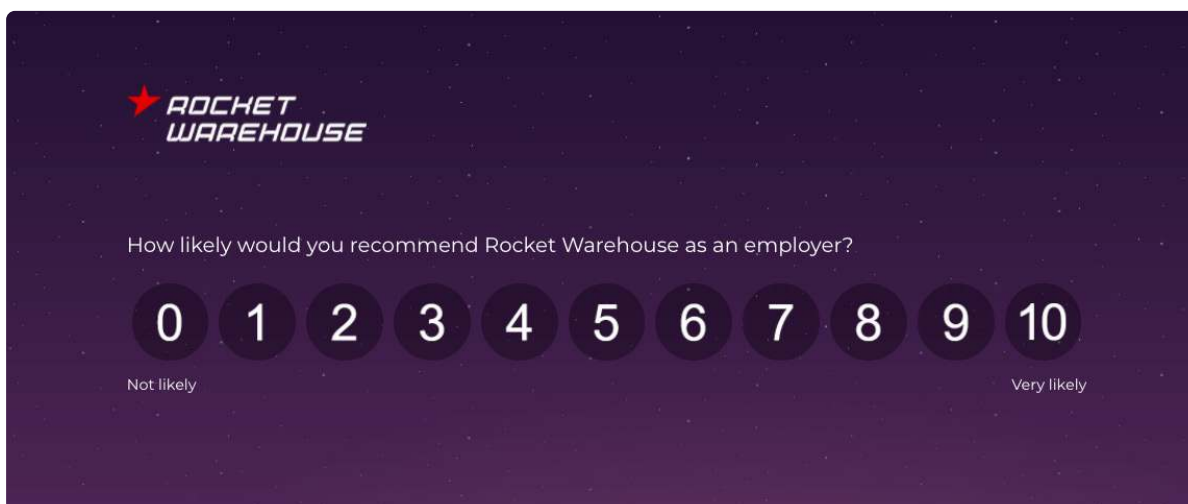
<https://bit.ly/3Dp3GDw>

Click here to see a live preview of this form!

# eNPS

eNPS is an abbreviation of the term Employee Net Promoter Score. The eNPS is measured with a single question, about how willing, on a scale of 0 to 10, the employee would be to recommend the company to others as a potential employer. For example, the question can be worded as follows:

**How likely are you to recommend our organization to your friends?**



The eNPS value is calculated by subtracting the percentage of responses between 0 and 6 from the percentage of responses of 9 or 10, i.e. from the most unreserved recommendations.

The results can thus be between -100 and +100.

For example, if a 100-person customer service organization receives a rating of 9 or 10 from 54 employees and a rating of between 0 and 6 from 13 employees, the resulting eNPS is 41.

## TIP

### What is a good eNPS?

We often advise clients that an eNPS between 15 and 40 is considered good, and a score above 50 is excellent. The most important thing, however, is to benchmark against historical trends and try to find ways to improve.

And it is obvious that companies with a high eNPS seem to have far more satisfied than dissatisfied customers. A most of our customers measure eNPS and NPS side by side, we see a strong correlation between those two metrics.

# Predefined icon questions

**Predefined icon questions have become more common for two reasons:**

- 1) They provide the respondent with a quick and convenient way to target the experience
- 2) They are excellent for classifying and analyzing data.

Open feedback is extremely important for development, but the main difficulty with it is that usually only a fraction of respondents bother to share their experiences. However, this does not mean that respondents are reluctant to specify the reasons for their experience.


For this reason too, we prefer predefined icons. The respondent can specify the reason for their disappointment or satisfaction in a matter of seconds and with very little effort.

Our predefined icons can be customized to meet the needs of your organization, but we recommend basing them on the most important drivers of customer service organizations:

- ✓ Team management
- ✓ Meaningful tasks
- ✓ Training
- ✓ Clarity of goals
- ✓ Recognition for performance
- ✓ Opportunities for advancement
- ✓ Compensation
- ✓ Other

## Icon questions for CS

eNPS 9 or 10 -> "Where did we succeed?"	eNPS less than 9 -> "Where could we improve?"
Team management	Team management
Meaningful tasks	Meaningful tasks
Training	Training
Clarity in goals	Clarity in goals
Recognition for performance	Recognition for performance
(Opportunities for advancement)	(Opportunities for advancement)
	(Compensation)
Other	Other



# Open-ended questions

There are many approaches to how open-ended questions should be formulated. Sometimes, positive things and suggestions for improvement are separated into two different open-ended questions.

In order to keep the survey as short as possible, however, we recommend using only one open question.

We have gained the best experience with a single open-ended question about both the reasons for satisfaction and areas for improvement. For example:

## **What has gone particularly well, and what could we improve on?**

In this model also, open-ended feedback can be categorized as either disappointed or satisfied by relating the open-ended responses to the eNPS figure.

Some of our customers also use a model in which the question changes according to the eNPS score.

An example of formulating an open-ended question according to the respondent's willingness to recommend the company:

For those who recommended us:

**What do you value most in our workplace?**

For those who gave a neutral score:

**What should we develop to make your experience even better?**

For those who were disappointed:

**What should be changed to make your experience better?**

**TIP**

### **Did you know?**

Surveys that use an icon question before an open-ended question receive more open-ended feedback than surveys that do not have an icon question. The reason for this is that the respondent feels a need to justify their choice of icon, which leads to more detailed open-ended feedback.

# Survey invitation letter

**A good invitation to take the survey is one that is as concise as possible.**

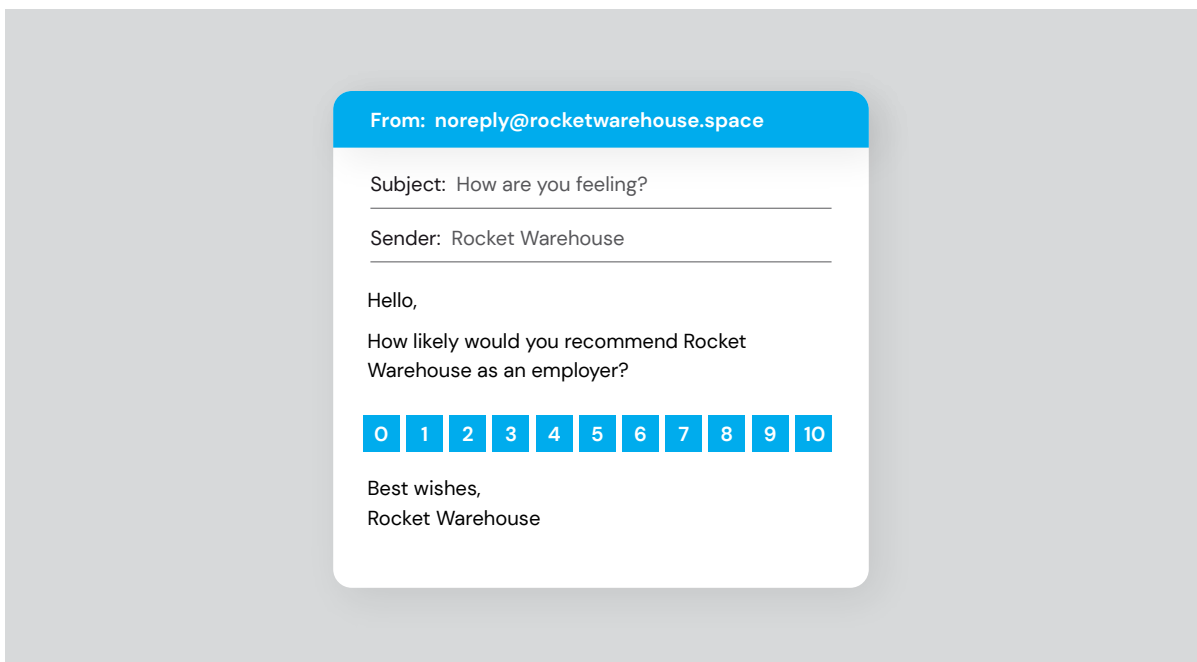
To maximize the response rate, it is most effective to go straight to asking about the respondent's experience and omit giving reasons for the questions altogether.

For example, telling respondents that a survey is short and that answering it matters a lot to the company may seem wise, but our practical tests showed that a better response rate is achieved by getting straight to the point instead of justifying things.

It is also important to avoid a long and dull heading in an invitation letter to complete a survey. For example, the title "Agent satisfaction pulse survey" is much weaker than a heading that refers directly to the experience itself:

**"How are you feeling?"**

If the survey is administered by email, we recommend putting the first question in the email title field. Here is an example of an invitation to take a survey:



# Survey frequency

**Finding a suitable survey frequency depends on the culture of the customer service organization.**

The most typical survey frequency is weekly or monthly repetitive pulse surveys.

Daily pulse surveys are less common, but some organizations may decide on a daily measurement in which the customer service representative gives their assessment at the end of the working day.

When choosing a suitable frequency, it is worth minimizing the burden on the employee and avoiding survey fatigue by asking too much, or too often. On the other hand, it's also important to ensure that the information is sufficiently usable and that problems are reacted to quickly.

# Methods of administering the survey

The most typical and efficient way to administer the surveys is to integrate them into the customer service system, which ensures that they are sent automatically at the agreed frequency to all customer service representatives.

Integration of the survey into the HR system is also a common and effective solution. The most important thing is that the survey be sent to all employees, accompanied by all the background information needed for the analysis.

Prior to the tidal wave of remote working caused by the Covid-19 crisis in some customer service units, staff experience was also measured in person using mobile devices. The customer service representative

could easily give a grade in this way at the end of the working day. The difficulty with this method is that when answering, the background information cannot be used in the background. Because of this, the respondent has to be asked for information about their supervisor, for example. And of course, the habit is outdated in organizations where a lot of the work is done remotely.

The methods of administering surveys are:

**Automated sending to the customer service system** – the sending of a survey to the customer service representatives about the customer service system is triggered automatically at the agreed frequency

**Automated sending from the HR system** – the HR system sends the survey directly to the customer service representatives

**Passive publishing** – everyone has an icon for the survey on their computer or mobile phone. Answering is voluntary or as agreed.

**Manual publishing** – The basic information on the respondents and the background information is exported from Excel to SurveyPal and a timer is set for the survey.

**Tablet device** – for example, there is a tablet at the door of the customer service unit for the employees to easily record their feeling and team information at the end of the working day.



# Improving survey response rate

The optimization of the survey response rate is the sum of many factors. The main such factor is whether the respondents consider answering the survey to be important. If survey results are not gone through together with the staff and no improvements follow, a natural solution for many is to not respond to subsequent surveys.

Here are some additional tips for increasing response rates:

1

## Pre-market the survey

- Explain the purpose of the pulse survey to the staff, as well as the importance of responding to the survey and how the responses will be handled

2

## Optimize the survey frequency

- What survey frequency works best in terms of both responses and processing the results?
- Change the frequency if necessary

3

## Optimize the invitation letter

- Test different invitation letter headings and choose the best one
- Conciseness works best – keep it short
- Include the first question in the email itself

4

## Keep the survey concise

- The open-ended question can provide information of details – not all things need to be asked about separately
- Keep the questions brief as well, and do not use unnecessary headings and background information

5

## Optimize the answering experience

- Enable automatic page shifts
- Make the survey visually appealing and in line with the company's brand
- The icon question is quick to answer and helps to focus the experience
- Ensure the questionnaire will work well on mobile devices

# Survey background information and survey anonymity

## How are the different teams feeling?

In which customer service group does the increased workload most affect coping at work?

## What team leaders need support the most?

Are there differences between customer service channels?

In a good pulse survey, the empirical data is accompanied by essential background data that helps to target development work.

When reviewing the results of a pulse survey, it is essential that the responses be accompanied by background information that facilitates classification of the data.

Customer service representatives can respond to pulse surveys either anonymously or so that they are identifiable.

A process in which the respondents are not identified encourages more frank responses. However, it is increasingly common in customer service operation for respondents to answer under their own name. This enables more closely targeted data on the correlation between staff

experience and customer experience to be obtained for the purposes of development work. In addition to development at the team level, improvement measures can be targeted at helping individuals.

However, if the company chooses to use an anonymous survey model, the security of anonymity can also be increased with a Surveypal function that prevents individual responses from being viewed if a sufficient number of responses have not been given. This security margin for anonymity can be defined separately for each survey. It is most typical to use a margin of four respondents as a security margin in the staff pulse survey.

The desired background information varies by organization, but the most typical background information is

- ✓ Name of customer service representative/supervisor
- ✓ Main customer service channel
- ✓ Team

- ✓ Role / task
- ✓ Name of supervisor
- ✓ Office

# Reporting methods

To understand and manage your customer service team, you need clear and actionable insights. Ensure that staff pulse survey data does not become isolated as its own silo.

Comparing performance data, customer experience data and employee experience data makes it possible to see the full picture.

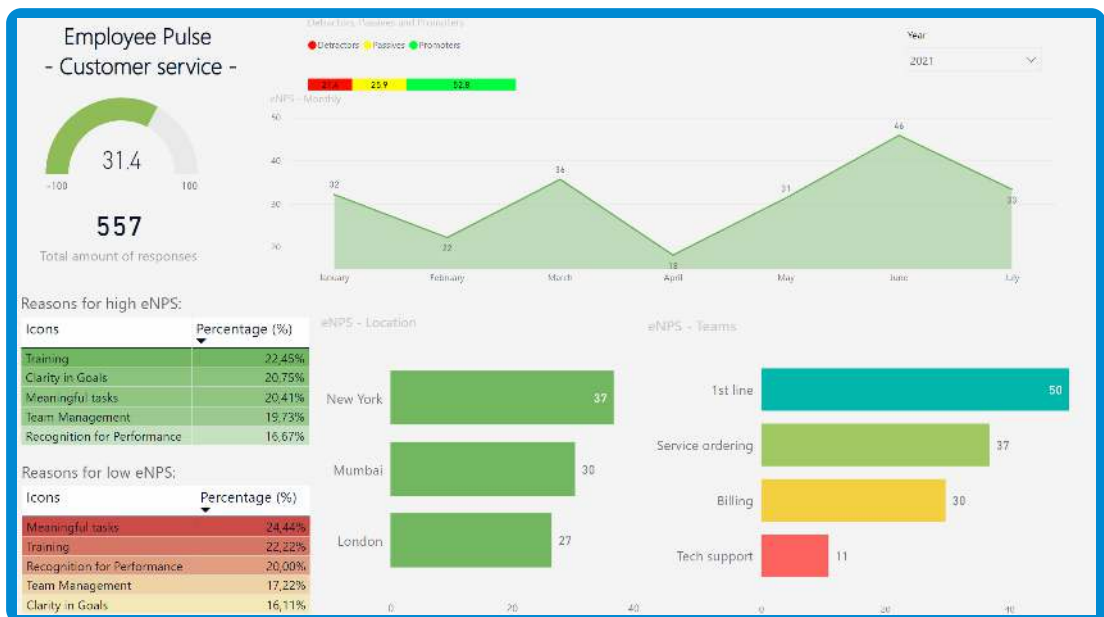
But when those data points are siloed in separate systems, it's much harder to understand the correlations, guide your team and plan the right actions.

Reporting is possible in many systems. In the feedback models offered by SurveyPal, the most typical reporting methods are:

**Separate BI system.** For example, Power BI, QlikView and Tableau

**Customer service system reporting and BI system,** such as Zendesk Explorer

**SurveyPal reporting**



Screenshot of a staff pulse survey carried out using Power BI.

## Dimensions of reporting

Data can be converted into observational views and ultimately into effective actions if the questions are well designed and accompanied by adequate background data.

Data use is at its best when staff experience data is combined with the efficiency data provided by the customer service system, such as the number of resolved tickets, the degree of resolution and resolution times, and the customer experience data obtained through the feedback system.

The figure below shows the most typical dimensions of staff pulse surveys:



# Management methods

**In weak feedback models, the problem is often not the survey methods or weaknesses in the reporting but in how the feedback information is used in management and development.**

In the best operating models, pulse survey results are reviewed regularly and sufficient time is set aside for this.

Progress is made when the customer service teams meet to discuss the results and think about a theme: How can we create a better work community together?

It is the responsibility of management to ensure that good development proposals lead to improvements. It is also important to consider the reasons for success and satisfaction alongside development efforts.

**You can check your company's management model situation with the following questions:**

- 1 Are the results of the pulse survey conveniently available?**
- 2 Are the survey results processed on a regular agenda?**
- 3 Are development measures discussed throughout the customer service organization?**
- 4 Has the pulse survey led to any concrete changes in day-to-day practices?**

## X + CX + QA = Super progress

In our experience, more than half of customer service organizations completely lack a regular process of measuring the customer service representative experience. Some organizations conduct continuous measurement, but it is not very beneficial.

So what do the best, “black belt” organizations do differently?

In the best customer service organizations:

- 1 Experience is measured by smart methods
- 2 Not only the staff experience but also the customer experience are measured using methods that support the strategy and enable an excellent response experience. Also, internal quality assurance is conducted through a regular process
- 3 Reporting has been made easy
- 4 Reporting takes into account the dependencies of the employee experience (EX), customer experience (CX) and internal quality assurance (QA)
- 5 The management model ensures the continuous and regular development of operations

# Pulse survey feedback model developer's checklist

## Survey

- ✓ Set the goal
- ✓ Decide on the questions
- ✓ Create an inspiring and concise survey
- ✓ Make the necessary language versions
- ✓ Write a concise invitation to take the survey
- ✓ Choose the distribution channel and method
- ✓ Choose the appropriate survey frequency

## Reporting

- ✓ Specify recipients for live reports
- ✓ Enter any required reporting in the BI system
- ✓ Select the background information to use
- ✓ Set a response margin that protects anonymity
- ✓ Make it possible to view staff pulse survey data alongside customer experience data and other data

## Management and development

- ✓ Set development goals for the eNPS score
- ✓ Agree on the feedback processing forums
- ✓ Decide on the frequency of feedback processing
- ✓ Decide on experience data communication practices
- ✓ Decide on team development meetings
- ✓ Focus resources on the areas where there are difficulties
- ✓ Make concrete changes based on the staff experience data
- ✓ Celebrate successes, and also include positive feedback in the discussion
- ✓ Track the correlation between the staff experience and the customer experience

# Concluding remarks

**Want to develop how you measure the customer service experience?**

SurveyPal helps customer service organizations measure and manage the customer experience and the employee experience. **Contact us – we will be happy to discuss your situation with you!**



[helpdesk@surveypal.com](mailto:helpdesk@surveypal.com)



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