CALLPOTENTIAL

THE ULTIMATE GUIDE TO

Call Center Software Management

Own your call process to generate better results.

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ABOUT CALLPOTENTIAL

97.8%
Average satisfaction rating from our customer success and support teams

6X
Inside Self Storage Best of Business Award Winner

46 M
Powered over 46,000,000 conversations in 2020

Founded in 2010 by Owner/Operator Phil Murphy, CallPotential was designed as a game-changing suite of technology that closes leads faster with less waste, reduces past due rent with automation, and raises the caliber of customer service unlocking operators maximum profit potential.

Our modules were designed by storage industry veterans who understand and solve pain points using our tools with omni-channel communication like text, calls, and email. With CallPotential, every storage operator can run their business or facilities smarter, faster, and at any scale.

COLLECTION MANAGER

CONTACT CENTER

LEAD MANAGER

MARKETING MANAGER

PERFORMANCE MANAGER

INTRODUCTION

Call centers are often the hub of your communication, the link between you and your customers.

This "hub" can look and work differently for many businesses, which is why understanding your options is so important. In this guide we'll give you a comprehensive overview of different call center options, how to determine the best solution for your facility, and the key components that make a call center successful.

MORE SPECIFICALLY, WE'LL DISCUSS:

- The real difference between a call center and internal call center software

- The importance of your caller journey & customer satisfaction

- The different types of call centers and how they work

- Phone IVR best practices

- Knowing when to outsource

- The benefits of managing your own call center

- Which call metrics really matter

- Helpful tips to run your call center & how to get started

AT THE END OF THE DAY, CALL CENTERS ARE A MAJOR PART OF YOUR BUSINESS, AND WE'RE HERE TO HELP PERFECT IT.

LET'S GET STARTED!

CHAPTER 1 - CALL CENTER BASICS

Understanding your customer journey.

WHAT IS THE DIFFERENCE BETWEEN A CALL CENTER AND CALL CENTER SOFTWARE?

Call centers are a centralized or decentralized hub of agents that manage calls from one facility, or many.

Unlike a traditional call center, internal call center software can offer a more modernized approach without the negative "call center" stigma. Many like our own Contact Center are able to power more than just a phone call - they take care of entire customer conversations using omni-channel communication like text/chat, email, phone, and IVR (interactive voice response).

Much like a full fledged call center, internal call center software can serve as three-fold departments handling inbound (customer support, billing, inquiries), outbound (lead management, debt collection) and sales calls.

They can be managed internally, through a third-party service or, more commonly, a blend of the two so no call is missed.

In fact, a recent study found that *almost 20% of calls to businesses go unanswered or to voicemail* - a totally preventable problem. When reviewing your options, understand that a call center's role is to successfully carry a customer from point A to point B without roadblocks, regardless of availability or process.

HERE'S A BREAKDOWN OF THE 3 TYPES OF CALL CENTERS:

In-House

- Internal call centers are usually managed on-site using employees to handle all inbound, outbound, and sales calls through specialized software like CallPotential's *Contact Center.*

- ***Store Based Agents:***
Call volumes don't always justify a dedicated agent so smaller operators will utilize their existing store managers from slower stores. The location is still the first step but if the manager doesn't answer then the call rolls over to these specialized "Agent Managers" This allows you to still take control of your call process in situations you may not be able to justify a dedicated agent.

   For example, an eight store operator that utilizes CallPotential Contact Center analyzed their calls and found that 93% of their off hours calls were coming in the hour before the store opened and the hour after it closed. Therefore they adjusted operating hours for two of their stores which allowed them to capture almost all of their off hours calls without the addition of any employees.

- ***Dedicated Agents***
This is more in line with a traditional call center as many of us picture it with dedicated staff and personnel answering phones. These can vary from only handling certain kinds of calls, such as lead, collection calls or roll over calls, to call centers that handle all calls such as 1st ring. We have found customers with dedicated agents as small as single agents to larger call centers running multiple agents across multiple call centers.

- ***Blended Agents***
The two approaches above are often blended especially to deal with high volume parts of the month. We will often see an operator staff their dedicated agents to handle typical call volume throughout the month. They then utilize their store agents during peak times such as first of the month or holidays and weekends when they may not have a fully staffed call center.

   We see this approach often as operators grow into a fully dedicated call center to deal with the transition as well as some larger operators who are helping to balance out the high and low parts of either the day or the month.

Third-Party

- Third-party call centers are simply an outsourced team of agents through a call answering or routing service. Although they may seem like the easiest choice, the operator often has to decide how important the caller's experience is and how willing they are to let an external party own this.

THE CALLER JOURNEY

Establishing your call center process is a major part of your business, and there are many important factors to take into consideration. Before you assess your options, put yourself in the position of your customer and map the interactions throughout their journey.

- Was there a wait time?

- Was my agent knowledgeable and friendly?

- How quickly did I get an answer to my question?

- Were they equipped to address my needs?

- What are the next steps?

- Did they follow up on my experience?

There's a lot to examine. Most times, their path isn't as linear as the example above. With roadblocks like confusing phone IVRs, untrained agents, or slow service, many customers are prevented from getting the information they need, leading to frustration. In fact, a recent report showed that _67% of customers hang up in frustration while waiting for a representative to answer._

> ## "67% of customers hang up in frustration while waiting for a representative to answer."

These issues are preventable and the reason why it's so useful to map out your caller journey. In the long run, it'll drastically enhance your customers' experience and reveal areas in your operations that you didn't even know needed improvement.

THE IMPORTANCE OF CUSTOMER TRUST

Creating a genuine connection between you and your tenants should be the core of your business. After all, they're relying on you to safeguard their belongings.

Whether you decide to insource or outsource your call center, the service you provide is a direct reflection of your brand and trustworthiness. More importantly, their experience with your call center, and your business in general, can dictate the bottom line.

Tenants are also relying on you to be the expert at what you do! If your service is unreliable or unable to deliver what you promise, kiss your credibility goodbye. Keeping a consistent and positive experience across every touchpoint will position you as a reliable, trustworthy business.

PHONE IVR BEST PRACTICES

WHAT IS PHONE IVR?

Phone IVR (interactive voice response) is an automated, voice-operated system to direct inbound call traffic through an input keypad or speech recognition. If you've ever called to pay a bill, make an appointment, or contact customer service you've probably heard a prompt similar to "Press 1 to speak to billing, press 2 to speak to a customer service representative..." and so on. These automated systems are an effective way to route caller traffic efficiently and limit your response turnaround time.

Every time you ask your caller to perform an action you increase the likelihood of them hanging up and calling a competitor.

To combat this, here are a few best practices to consider when implementing IVR into your business:
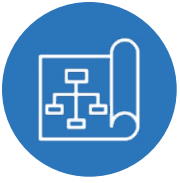
HAVE A PLAN

- Be proactive in your IVR implementation. Try to anticipate every possible question or issue a customer may have before setting up your call route.

- Map out your caller journey to visualize and better understand when and who to route a call to.

- Establish your menu options and have a set script.

- Decide what actions will be taken once an option is selected (call forwarding, voicemail, redirect to another menu)

- Have a contingency plan. It's important to think about where there could be gaps in the call flow, and to have a plan B if something goes wrong.

- Be prepared to analyze your IVR data on a regular basis in order to improve your process.

LIMIT YOUR MENU OPTIONS

- Three IVR menu options are most common in our industry, but no more than five should be used. The benefit of having an IVR system is that it acts on behalf of a 24/7 agent. By providing the caller with a little direction, it can help deliver a better consumer experience.

- Get to the point. Long-winded menus might sound impressive and professional, but every second of length increases your hang-up rate.

PERSONALIZATION

- Although the message can be automated, you should consider recording a person's voice to keep it personal.

- If you have a bilingual staff, IVR's can be a helpful option to accommodate consumers that use other languages.

- If there's a chance to customize the IVR recording, do it. Adding the customer's name or a friendly greeting can make all the difference.
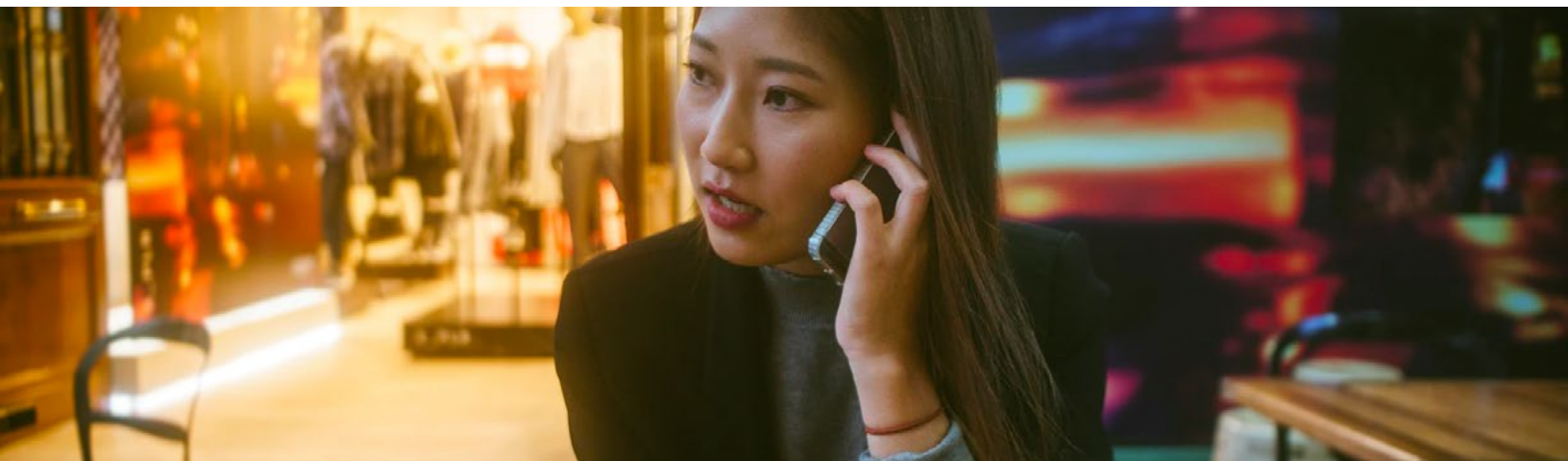
PHONE IVR EXAMPLE

Hi, thank you for calling Awesome Sauce Self Storage. To rent a unit, press "one". To pay your bill, press "two". To leave a message, press or say, "three".
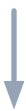
KEY PAD

1   2   3

RENT A UNIT   **PAY A BILL**   **LEAVE A MESSAGE**

CHAPTER 2 -
MAKING THE RIGHT DECISION
Insourcing vs. Outsourcing

INSOURCING VS. OUTSOURCING BASICS

Running a contact or call center in itself is a huge milestone in any organization; it's the tell-tale sign that your business is successful and growing! Achievements aside, it's a huge undertaking to rapidly expand your operations and accommodate a growing customer base. The upkeep of running a complete internal contact center could be strenuous work for you and your staff, so sometimes hiring out (or doing a mix of both) could be your best option. But when is the right time to consider outsourcing or insourcing?

YOU MIGHT WANT TO CONSIDER REVIEWING YOUR CALL CENTER OPERATIONS IF...

YOU'RE A SMALL OPERATOR WITH 5 PROPERTIES OR LESS.

- Whether you're a new operator with 1 location or well-established with many locations, we don't recommend complete insourcing if you have fewer than 5 properties. Powering your own call center could strain resources and slow your momentum of growing your business. Instead, a blend of third party and in house services could serve as your best option for handling calls according to your availability.

YOUR DESIRED HOURLY COVERAGE CAN'T BE MET USING IN-HOUSE EMPLOYEES.

- Many times people are convinced they need 24/7 coverage, when in reality the person calling at 2am is almost always a customer.

  In cases like this, sometimes it's easier to use a call center software that can direct them to your website in the off-chance that it is lead. This can potentially save thousands of dollars in coverage on a call that only has a 50% chance of renting.

YOUR CALL CENTER EXPENSES ARE HIGHER THAN THE RETURN.

- Unfortunately, many third party companies lock clients into an annual contract which can be extremely limiting and unpredictable for first-time users. For those that are hesitant or simply not seeing a high enough return, it's difficult to wait out that year until the contract is up.

- There are, however, more modern solutions that have entered the industry within the past few years that offer month-to-month terms. *CallPotential's self storage call center software* offers flexibility that many third party companies can't compete with.

THE GENERIC CALL APPROACH JUST ISN'T WORKING.

- The #1 reason why many facilities internalize their call center is because they want to own their sales process and present their service the way they want to. At the end of the day, your staff is your best sales team and no one knows your service and products like they do.

THE ADVANTAGES OF INTERNALIZING YOUR CALL CENTER

There are many reasons to implement an internal call center. In fact, insourcing your self storage call center operations or using a blend of the two strategies can maximize your time, money, and overall customer experience. Here are a few key benefits to consider:

QUALITY

- No one knows your business better than your own employees, they are the experts of your products and services. By keeping your operations in-house, customers will experience your brand's caliber of service compared to an outsourced provider, in which you are one of many clients. By offering great training and resources to your employees, you can turn them into brand representatives dedicated to solving their needs.

COST REDUCTION & EFFICIENCY

- Cost savings are often a substantial benefit of bringing all or part of your contact center in-house. With little to no additional infrastructure needed, implementing a call center software can deliver results without increasing your staff. You're also saving a considerable amount of time by cutting out the middleman, allowing you to run your operations at your own speed, on your own dime.

CONTROL & INSIGHT

- Internalizing your self storage call center allows for an aerial view of your own process. : "By connecting your Property Management System (PMS) to your call center software, you can view real-time metrics and gain a quicker exchange of information without waiting for third-party reporting.

CUSTOMIZATION

- Part of the reason many operators outsource is to cover off-hours and route calls to a specific destination. Your platform should be fully customizable to fit your needs before it becomes a long-term solution.

Shift your employees' time from repetitive follow-up to making rentals. CallPotential's Contact Center software offers SmartRoute technology that has the ability to capture the customer's information and pre-determine the reason for their call. Because of this, it's easy to choose whether to direct the call to a call center or turn it over to a specific location for sales-only calls.

GETTING STARTED WITH CALL CENTER SOFTWARE

Evaluating a contact center platform is extremely important in your decision making process. Like any software, there are common functions, capabilities, and analytics that your platform should have.

1. EASE OF IMPLEMENTATION

- The easier it is to implement your new software, the better. Not all are easy, which is why it's important to choose one that is. A huge perk of internal call centers is that there's almost no added infrastructure needed. You can use what you have on hand without spending thousands on extra staff, tech, or other gear.

  Of course training is an important part of the onboarding process, which is why you should consider a software that has a fully-staffed support team. For example, CallPotential offers ongoing customer support to train and teach customers about new features, best practices, industry trends, and more.

2. INTEGRATION CAPABILITY

- The integration between your call center software and your Property Management System (PMS) needs to be seamless.

  At the very least, a reliable integration captures new customer information, identifies existing customer information, and routes the caller to the most appropriate destination.

  It should also offer features that provide a personalized customer experience in every aspect of your service: leads, rentals, payments, esigns, notes, inventory, and more.

  This not only extends the value of your customer data, but it meets the demand of personalization that customers look for.

3. CALL CENTER MONITORING

- One of the most important functions of your contact center is reporting. Your platform should track everything from agent performance and availability to customer call times, abandonment rates, and much more. In our next chapter we'll review a detailed list of the most important metrics and to better assess your platform.

TIPS ON FINDING A THIRD PARTY CALL CENTER

Tron Jordheim, Founder, Self Storage Strategies

Tron Jordheim is the host of the Self Storage Hawai'i unConference, and the director of the Call Here Self Storage Call Center. He is the Managing Partner of Self Storage Strategies, was formerly the Chief Marketing Officer of one of North America's largest privately held self-storage companies and director of the industry's largest outsourced call center. He has worked on self-storage projects, consulting assignments, and spoken at conferences in six countries. More information can be found at *selfstoragestrategies.com* and *hawaiiunconference.com.*

Of course not all self-storage operators have the capability to fully internalize their call center. We gathered a few tips from call center and storage strategy expert Tron Jordheim of Self Storage Strategies. Here's Tron's key list of considerations when scoping out a third-party:

■ *1. Blended Agent*
Can the call center perform the business model you'd like to use in your operations? Does the call center support enough different business models, so that you could choose an existing model if it fits your needs? There are many ways to run a self-storage business. A good call center provider is adept at many models and can recommend a successful one to you based on what your operations look like and what your goals are. A good call center can also save you from trying practices that they have already proven to be ineffective.

■ *2. Technology Nimbleness*
Can the call center integrate with the operator's operating software and other systems? Not all integrations are perfect or thorough. Does the call center know how to work with whatever technology integration shortcomings there are without sacrificing effectiveness? You should choose a call center and a system that can do full phone rentals, take payments and coordinate with automated collections, lead management, marketing tracking, and act as a remote manager.

■ *3. Agent Retention*
How often does the call center turn over employees? How experienced are agents? This is vital as it takes a solid six months for a new agent to become good at answering self-storage calls, and at least a year to become an expert. Constant turnover makes for poor call quality and poor sales conversions.

■ *4. Is the Call Center in the "Cloud"?*
Technology interruptions can wreak havoc on call centers that use on-premise technology. Having technology in the cloud means service interruptions are rare and short if they happen at all. Using a cloud call center with remote agents also eliminates the risks of local weather or sickness. Call centers that had employees working in one large center had many interruptions in cold and flu season in the past and had trouble with workers showing up for work in bad weather. Cloud call centers with remote agents had no interruptions to operations during the COVID 19 pandemic.

For more information on self-storage call center providers go to selfstoragestrategies.com/call-centers

CHAPTER 3 -
METRICS THAT MATTER

Using your data to boost performance.

IMPORTANT METRICS TO TRACK

Regardless of your decision to insource or outsource, measuring the right metrics is important to keep your operations running smoothly and ensure customer satisfaction.

Aside from the few that we've listed, there are many other metrics and KPIs (key performance indicators) to measure. This short but definitive list is a good starting point to helping you become more strategic in your decision-making.

ANSWER RATE *(= # OF ANSWERED CALLS/TOTAL CALLS)*

- According to a study done by the Self Storage Association in 2020, 38% of new customers contact self-storage businesses over the phone. This is one of the many reasons why your answer rate is one of your most important KPIs and a determining factor when measuring the success of your contact center.

  Not only does it gauge the strength of your customer service, it can reveal areas within your process that aren't working.

  If your answer rate is too low, you know exactly what to problem-solve with solutions that fit your needs.

AVERAGE CALL TIME *(= TOTAL CALL TIME FOR ALL CALLS/TOTAL # OF CALLS)*

- Knowing how much time is spent on the phone can help you identify better training opportunities for agents and proactively address customer needs. You can break this time down even further by measuring your calls based on type (questions, complaints, billing, redirects, etc.)

AVERAGE TIME IN QUEUE *(= TOTAL QUEUE TIME FOR ALL CALLS/TOTAL # OF CALLS)*

- Your average queue time is directly correlated to your abandonment rate. If customers are forced to wait a lengthy amount of time to speak to an agent, it's likely that they will drop the call and never call back. It's important to know this metric so your team can work to keep this number low.

AGENT PERFORMANCE

Measuring your agents' productivity and problem-solving skills is an important part to not only your business, but your customers. In fact, 69% of customers judge their customer experience by how quickly their question or problem was resolved. By frequently tracking your agents performance, you can shine a light on problem areas and create great training opportunities for your staff. Some key performance indicators to measure on an individual level are:

- Average Handling Time and Time on Hold

- First Call Resolution - Is your staff effective in solving your customers' problems?

- Availability - Are they taking too many breaks? Not enough breaks?

- Customer Satisfaction - The most comprehensive way to measure their performance is by measuring how customers feel about their experience. It's the most direct way to identify what's working for your team and where they fall short.

CHAPTER 4 - ADDITIONAL TIPS

Training and Scripts

EFFECTIVE SCRIPT WRITING: DO'S AND DON'TS

Whether you're used to using a word-for-word script or a call guide, many of these tips are standard for contact centers in any industry and can help develop agent confidence:

DO

✓ Use a unified, integrated script and call flow to keep the spread of information consistent and accurate to your business

✓ Limit the number of mandatory fields required for every call, typically first name and phone number.

✓ Review your scripts frequently and adjust your tone to fit different situations (natural disasters, power outages, etc.)

✓ Write multiple scenarios for every script (the goal is to think of everything before the customer does)

DON'T

✗ Don't complicate things. Make your script short, sweet, and to the point. If you have questions for the caller, make sure they're clear and concise.

✗ Don't make the customer feel like the agent isn't reading from a script. On the other side of the phone is a real human being with feelings and emotions. You want your customers to feel comfortable discussing their questions, concerns, and especially their complaints.

CALL CENTER TRAINING TIPS

There's a lot of pressure on contact and call center agents to perfect each customer interaction in a timely manner. The key to keeping your employees successful is providing continuous training, guidance, and goals to stay motivated.

PROVIDE ONGOING TRAINING

Offering new ways to grow and learn builds a great foundation for employee success. One of the best ways to provide ongoing training is through a shadowing program. Sometimes employees feel more comfortable learning new techniques from their peers. Not to mention, it's a huge confidence builder.
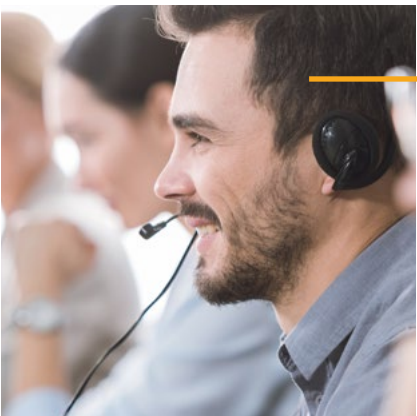
SET GOALS AND OBJECTIVES

Give your employees something to reach toward. Working blindly toward a goal can be discouraging and force employees to lose motivation. By setting clear, attainable goals, employees can better understand the value of their work.

GIVE FEEDBACK FREQUENTLY

The follow-up to goal-setting is to give input on the agents' progress. Offering constructive feedback is a great way to help them improve or understand where they're struggling. Many contact center softwares offer behind-the-scenes insight that can track individual performance (i.e. total calls accepted, rejected, cascaded, etc.)

TIPS FROM OUR TEAM.

TIPS AND TRICKS FOR RUNNING
A SUCCESSFUL CALL OR CONTACT CENTER:

"

"When we help our clients build call routes, we try to put them in their customers' shoes. We ask "Do you want to hit 3 different IVRs or hear 'Thank you for calling ABC Storage; 5 times?" Make it simple for them to give you their money!"

—— **IRIS,** *CUSTOMER SUCCESS MANAGER*

"

"Prioritize your first impression. There's no experience like a first-hand experience - give your customers exceptional service every single time the phone rings."

—— **SARAH,** *CUSTOMER SUCCESS MANAGER*

THE BOTTOM LINE ON
YOUR CALL CENTER MANAGEMENT

Although it varies across our industry, choosing a contact center strategy doesn't have to be a difficult or daunting decision. It's a decision that depends on your existing needs, financial situation, and overall capacity to manage a contact center. We hope our guide was helpful in determining the best route for your business, or improving your call process as a whole.

Interested in learning more on how CallPotential can strengthen your call center operations? Reach out, we're here to help.

SOURCES

CALLPOTENTIAL BLOG

- https://blog.callpotential.com/

CALL CENTER PROVIDERS

- https://selfstoragestrategies.com/call-centers

SELF STORAGE ASSOCIATION DEMAND STUDY 2020

- https://www.selfstorage.org/Products-Services/Research-Data

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"We're able to track everything with one software rather than 25! It's really helpful to track where all our leads are coming from. We're able to see how many calls were delayed, how many follow-ups we're actually doing, and how many outstanding calls for the day have not been done."

STORQUEST SELF STORAGE

MARA PAREDES, DIRECTOR OF OPERATIONS

READ THE FULL CASE STUDY HERE

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CONTACT US:

sales@callpotential.com

www.callpotential.com/schedule-a-demo

877-552-2557