

**White Paper**

# **Modelling Success in your Organisation**

## ***Enabling world class Customer Experience***

***What ‘makes the difference’  
in your top performing Call  
Advisors and how to bottle  
the ‘it’ factor for others to  
learn***

*“Whatever you can do or believe you can do, begin it now. Boldness has then power of magic in it”.*

Goethe

Have you ever considered what makes your excellent performers, excellent? Surely by the law of averages, people recruited against the same criteria, for the same type of job, who attend the same induction and training programme, should not differ in performance as much as they do? Well, in theory that is - but as we know, the truth is often a very different story.

What would it be like if you could take your top performing call advisors, managers or leaders, sit them down and ask them to explain how they do what they do and what is ‘the difference that makes the difference’? And to do so to the rest of their team and explain it in such a way that everyone one understands and can then go and replicate and apply these behaviours for themselves? Great thought, isn’t it?

Just think about how that would affect your world – the impact that could have on your training budget, performance and results – if the call advisor was top in sales, what would the impact be on sales targets? If it were a highly motivated team leader who consistently motivated his/her team and had low attrition and absenteeism what would the impact of replicating that across the estate – over time, with each team leader performing to this high standard, how would that actually affect strategic drivers? Recent statistics show:

- UK contact centres lose 10 million days per year in absenteeism<sup>1</sup>
- The cost of acquiring a new customer is on average £1,691<sup>2</sup>
- Cost of retaining a customer - £361 per annum<sup>3</sup>
- Cost of recruiting a call advisor - £4,400<sup>4</sup>

<sup>1</sup> Personnel Management Magazine, November 18th Alan Garton, Merchant Global Bench Marking Report

<sup>2</sup> Source Gartner G2 Survey 2002

<sup>3</sup> Source Gartner G2 Survey 2002

Still, it’s nice to dream...

And yet there are organisations which have been using an approach like this to enhance performance and develop into powerful self learning organisations. A building society is modelling inspirational service within its company, a soft ware company has modelled its top performing sales managers and has implemented a sale excellence course, a telco has dedicated much time and effort in modelling excellence in Customer Centric Behaviour and has run a major change programme to embed the behavioural results of this study. All to great business and people success. The technique by which they are doing this is an NLP (Nuero Linguistic Programming) based approach called Behavioural Modelling.

#### NLP – Some Background

NLP started as the study of human excellence and the methodology of how to teach behaviours of excellence. The field of NLP developed out of modelling human behaviours and thinking processes. Modelling processes involve finding out how the brain, ‘Nuero’ works by analysing language patterns, ‘Linguistic’ and non-verbal communication patterns. The results of this study build a model or programme, (Programming) which can then be used to transfer the particular skill being modelled.

It was started in the 1970’s in the USA by Richard Bandler and John Grinder who began by modelling language patterns of Fritz Perl (the founder of Gestalt Therapy), Virginia Satir, (A founder of family Therapy and systemic therapy) and Milton Erickson (Founder of the American Society of Clinical Hypnosis). They took the information gained to understand how others could achieve the same standard of excellence as these key pioneering figures. They believed, if someone could do something well,

<sup>4</sup> Source Welsh Call Centre Association

they could find out how and learn how to do it too.

## Behavioural Modelling

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Robert Dilts, who worked with Bandler and Grinder, describes behavioural modelling in his book 'Modelling with NLP' as 'observing and mapping the successful processes, which underlie an exceptional performance of some type. It is the process of taking a complex event or series of events and breaking it into small enough chunks so that it can be recapitulated in some way. The purpose of behavioural modelling is to create a pragmatic map or 'model' of that behaviour which can be used ...by anyone who is so motivated to do so'.

And here the word 'motivated' is key. Modelling stems from having a curiosity about the way in which someone else does something well, and the true desire to find out how it is done.

Robert Dilts developed these techniques and created models not only of then living geniuses, such as Walt Disney, but of earlier great artists and thinkers such as Albert Einstein, Mozart and Da Vinci.

*"If you can dream it, you can do it" Walt Disney*

In his modelling of Walt Disney he was able to define part of Disney's creative strategy. Disney wore three different hats (metaphorically) when creating a project. Firstly that of the dreamer; secondly that of the realist where he assessed his initial dreams in a realist frame and thirdly that of critic – where he severely critiqued his ideas. After this, he would repeat this process, allowing his ideas to develop and mature, freeing his imagination as well as applying realistic and critical analysis. He applied this technique with his creative team also and was known for being either an enthusiastic fellow brain-stormer or a terrifying and demanding critic.

*"There were three Walts and you never knew which one would show*

*up to your meeting" Disney's animator*

In terms of business application, Dilts has developed 'The Disney Strategy' which is a creative process organisations can use in brainstorming, where the output is a well critiqued, realist plan which has included high level, 'blue sky' and lateral thinking and thus has the potential to be both robust and imaginative.

## Many applications for Modelling - The Spelling Strategy

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Modelling is not just about modelling individuals, it is also about finding out about specific skills and capabilities. Dilts, a self confessed poor speller himself, developed the 'spelling strategy' which has helped school children and adults all over the world. He modelled 'good spellers' and found that unlike so called 'poor spellers' they generally look up to the left and 'see' the word they are about to spell. In NLP terms this indicates an 'accessing strategy' of remembering a visual image. With combined further observation, questioning and research, Dilts was able to complete a strategy for spelling which others can use to improve their spellers. Good spellers simply 'remember' the visual image of the word – something which goes against traditional methods of teaching children to sound out each letter only to be confounded by the vagaries of English language phonetics when trying to read. (For further detail on Dilts' Spelling strategy see [www.nlpu.com](http://www.nlpu.com) Articles, The NLP Spelling Strategy)

## Modelling in the Past

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There are many forms of modelling and it is not new as a concept. Most of what we have learned, good or otherwise, has been modelled in some respect. We model significant adults as we grow up, in fact babies and children are expert modellers, it is only when they start traditional forms of education, as Sue Knight points out in her book, NLP at Work, that we lose

the inherent ability to model, as it is trained out of us.

In terms of business, industry has had its own 'modelling' processes. The concept of the 'apprentice' who learned the skill and craft of the expert over time and with often exhausting application, until he too became 'the expert' was a form of modelling. Even today, new staff are often placed or 'buddy-ed up' with a more experienced colleague. This is all well and good if the colleague is a 'model of excellence' and can communicate the processes well, if not, then bad practice is replicated.

We can all, I am sure, think back to a job or role where we were inducted by a so-called 'expert', badly and how that made us feel or behave. Our first impressions of an organisation are critical. If we have issues around negativity in a contact centre, the last thing needed is for a new member of staff to be inducted into that set of beliefs at the start of their career and it is alarming how often this happens. Models of excellence in organisations are not just concerned with behaviour but with beliefs, values and identity, as we will come to discuss shortly.

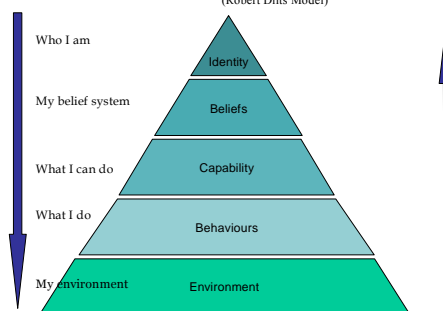
Mentoring is another example of modelling which again relies on the ability of the Mentor to impart his or her knowledge to the mentee for the relationship to be fruitful. This, unfortunately, is a skill that not all those chosen to be mentors, have.

### Modelling at The Logical Levels of Change (Robert Dilts)

The modelling process approaches its subject from the perspective of each of what Dilts has termed, The Logical Levels of Change. Modelling does not only focus on visible behaviour which is observed, but information is gathered at each of the Logical Levels of Change as shown in the diagram below.

### Logical Levels of Change

(Robert Dilts Model)



It is important to understand the beliefs and values, and the motivation behind a subject's excellent behaviour, remembering that outward behaviour is the manifestation of a combination of internal processes and internal state which include; thoughts, beliefs and values, use of language, and emotions and state all of which go to make up the individual's identity.

### Identity

Identity is key in modelling. It is interesting to explore how a how an employee identifies with their role and with the company. In the pub, meeting someone new and being asked 'What do you do? How a call advisor answers the question will give us an idea of how they identify with both role and company. Do they say 'I work in Customer Services in XYZ Company '(associated with both role and company) or alternatively ' in a call centre', (disassociated from both).

How do you describe your role when you are asked? How would your team answer the question? What about your call advisors?

### Sales Identity

Identity is particularly interesting in terms of excellent behaviours in call centres when dealing with sales teams. Generally speaking, in our experience, the more motivated advisors will be fully identified with the sales role. One of our Contact Centre clients had issues of low sales. We found that the team had previously been solely a customer services team. They had demonstrated excellent customer services behaviours and when the new

sales function was opened, they had been moved over – lock stock and barrel. The action was considered to be promotional by the company as they had the potential to make more money through commission. However, the team did not perform as expected, despite an intensive sales training programme. Our investigations found that 85% of the team did not identify with a sales role, did not believe they could sell or that the customer coming through to them wanted to buy from them. The majority wanted to back in a purely Customer Services role. If something is not right at the identity level, then no amount of training will make behaviours stick.

### Beliefs, Values and Motivation

Beliefs can be described as filters through which we run our world. They are incredibly powerful and complex. We can hold paradoxical beliefs, ('I am not good at presenting' and 'I love being the centre of attention') limiting beliefs ( 'I'm not good enough for a promotion ) and have a whole host of beliefs we hold in our unconscious mind, which we may not even know about, but which influence us to behave in the ways that we do. Our beliefs drive our behaviour; they influence our values and motivate us. It is not very easy to change beliefs – think of poor Galileo – but it is possible, eventually.

Recently, we were modelling behaviours in a contact centre for a financial services client. One advisor modelled demonstrated excellent customer centric behaviours and also always met her call handling targets, despite the fact that most of her colleagues had complained to us about the impossibility of 'being nice to the customer' and 'meeting call times'. When questioned about this she revealed she had an absolute belief that she would meet them – she utterly believed that in the day there would be a mix of calls where she needed to spend more time and some calls that would be very quick and balance the

time out. Her belief drove her behaviour in a positive way. The call advisor with the belief that 'its going to be a bad day, all my calls are long and complex' or 'all my customers are screaming at me today' is also being driven by beliefs – but not having such a good experience.

In a telco company we worked with, advisors had the experience-day in and out- of irate customers complaining about the quality of the network. Although there was not much difference between networks in terms of service coverage, their experience reinforced negative beliefs about the service their company provided. When we came to work with them, we focussed them on what they would like to believe (that their company had a competitive network), finding out what that would do for them (give them more confidence with customers and pride in work) and finally what they needed to make that step in belief. As a group they decided they wanted more information from their managers about service levels in comparison to the competitors, and also to be informed about investment and in developments in the network. With this knowledge, they could begin to move towards a positive belief and also be more confident when talking to customers.

### Capabilities and Behaviours

The capabilities tie in to competence – 'what I can do' – and behaviours are an expression of 'What I do'. It goes without saying that training is necessary to equip employees with the skills and behaviours they need in order to carry out the new behavioural change an organisation wants to affect.

### Environment

It is important to take the environment into consideration on two levels. Firstly the actual physical place someone is in will affect them, whether or not it is hot, cold, a nice place, as will time of day – the end or beginning of shift.

I remember visiting a call centre last year and witnessing a team coming off shift. They looked tired, put their coats on with low energy and were walking slowly... until that is, they walked through the doors into the atrium where their whole physiology changed, the volume picked up, they were laughing and the energy was building up as they left through the exit doors. What would it take to harness that energy back onto the last calls of the day? Which advisor manages a consistent service throughout and what are his/her beliefs, values and motivation around doing so?

[Where do you see your organisation or department in terms of the Logical Levels of Change?](#)

ea Consulting - Customer Experience Case Study, Modelling Customer Centric Excellence in a Contact Centre

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A telecommunications company wanted to dramatically improve their customer experience as part of their strategic objectives. The market they were in was saturated and customer service was a key differentiator. They wanted to create and embed behavioural change in over 3,000 employees, which met their customer centric focus.

The company specified an outcome of:

- Increased customer satisfaction
- Working towards service through excellence
- Growing a first call resolution culture

The company knew that they had some excellent call advisors together with some average performers and some poor performers. As a company they had a strong brand image and a young, committed and passionate, high energy culture and were keen to capture the essence that made their excellent employees part of that culture. Working with them we defined a programme which would

enable them to understand what 'the difference that made the difference' in performance was through modelling behaviours of their top performers in the contact centre.

## The Modelling Process

The process is about closely observing, listening and debriefing call advisors in order to create a model of excellent Customer Centric behaviour. The debrief is a critical stage of the process, it is key to have the subject actually 'doing' the action or 'reliving' it, in order to model successfully. The model of excellence for something as broad as Customer Centric Behaviours, is usually a composite model, formed from examples of excellence taken from different subjects and put together to form one, integrated model of excellence, bespoke to the individual company.

Time was spent modelling a number of call advisors – it is important to model a variety of levels of performance in order to gauge difference, have controls and constantly be testing the model of excellence as it develops.

## Barriers to success

During the modelling process any barriers to success which will impede the embedding of the new behaviours are identified. These can be process related, cultural, behavioural, environmental, or at any level on the Logical Levels Of change. This is a point where some quick wins can take place – for example, one client relaxed the previously rigid greeting, as feedback was that this was restricting and it was hard to respond to the customer as an individual. Thus both advisors and customers felt more at ease. It is key to the success of any programme that these barriers are dealt with to ensure successful embedding. In one centre, a team had to walk to another floor to complete a certain task which took time and was resented by the advisors, this was quickly changed and immediate benefit felt. Not all changes are quick wins, some involve IT or are

around strategic objectives or drivers or cultural issues which take longer to influence. It is vital to acknowledge the barriers and work with them, communicating to advisors and the rest of the organisation what is being done and when, building on their positive beliefs and goodwill.

### Experiential Training Intervention

The complexity of the model required the design of a deep-rooted training solution with an innovative learning mix which would initiate behavioural change in employees. It was essential that this training solution was followed up by consolidation programmes to fully embed the behavioural model.

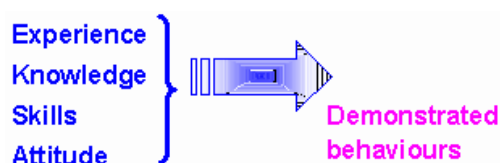
A two day training event was developed which involved experiential training, behavioural demonstrations, interactive audience-actor activities, trying-on behaviours and NLP based behavioural change tools, bringing them to life.

We also designed a train the trainer programme to take training ownership back into the organisation. This also encouraged trainers to apply their new creativity in meeting training objectives using a variety of different facilitation and coaching skill

We also designed and rolled out a coaching programme to Team Leaders, focussing on how to coach according to the model of excellence.

We firmly believe that learning takes place at both the conscious and unconscious level. An advisor needs to experience the new behaviour as well as have the knowledge which explains the need for the change.

ea Consulting Believe Experiential Interventions are Key in Delivering Behavioural change



The modules we designed to deliver the behavioural model are now used in induction and in recruitment and the approach has been used in designing and delivering training in the retail sector of the organisation. The study is an excellent example of well embedded behavioural change.

A major success factor was the high level sponsorship of the programme. The senior team were supportive stakeholders in the process and information was shared with the management layers up the organisation.

### The Results

- Increase in customer service levels
- Increase in customer satisfaction
- Increase customer retention
- Increase in employee satisfaction

The programme was grounded by KPIs and qualitative measurement tools, as all our programmes are. Results are confidential but the programme hit all targets and was hailed a success at the time of completion and a year after completion. (Please see the ea Consulting's White Paper: Hard Measure for Soft Skills for further information at [www.e-a.co.uk](http://www.e-a.co.uk))

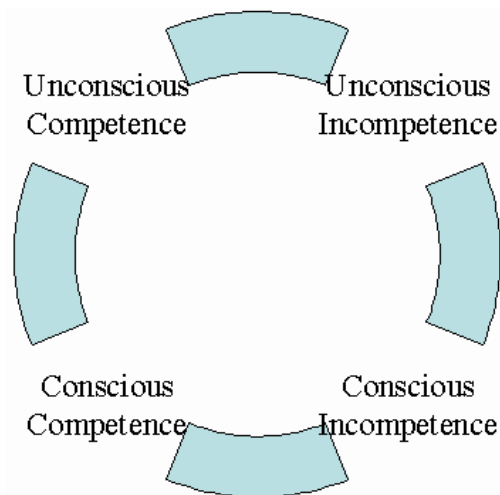
### Conscious and Unconscious Competence

A major part of the modelling process is getting the subject to identify 'consciously' what they do 'automatically' at an unconscious level. If we take the example of driving a car and I asked you if you took your test tomorrow, would you pass? Some excellent drivers amongst us might say yes, but perhaps the majority would say no. We drive on 'automatic pilot' sometimes not remembering how we got from A to B.

Yet when we were learning to drive, everything was a conscious process. The diagram below shows how an

Action/behaviour moves from unconscious incompetence (before we have our driving lesson and we don't realise how little we really know, or just before an advisor starts her training and thinks it will be like speaking to friends) we then move to our first lesson/day at work and into conscious incompetence where we REALLY understand how much we don't know. Then as we progress, we learn and we move into conscious competence – a bit shaky maybe and very aware of what and how we are driving/performing at work. Then, we pass our test, start driving and become used to the behaviours and they pass into our unconscious and we become unconsciously competent. At work the advisor becomes confident and moves to competence. The danger here is that it is also very easy to move back into unconscious incompetence- as we said, most of us would not pass our driving tests tomorrow.

### Model of Unconscious / Conscious Competence



Working with advisors with the model of Customer Centric Behaviours, they will often say, 'I didn't know how I did that'. This is an important part of the modelling process. We often need to remember our own capabilities and expertise and be able to model ourselves. We are all very capable of building rapport but we find some

people easier to build rapport with than others. Here it is useful to know what it is we do unconsciously when we build rapport so that it can be available to us on a difficult call, for example, when we need to use those skills consciously. Similarly we may have an area of work that we are very good at – time management or task focus-which in our home life doesn't happen. Here we can model ourselves to ascertain what it is we do, and map those skills across.

### Potential of Modelling

Modelling is an excellent tool for a wide range of applications. Personal growth and development is one area. Equipped with modelling tools you can literally learn to do – anything. And organisations are switching on to the fact that this is an excellent way to support their staff and organisation to become more self managing and self learning. It is an exciting state to be in – one of possibility and potential. A different way of development. Can we imagine an organisation where excellence, or at the very least the to find out how each other performs is at the centre of learning and development and the heart of the organisation. An exciting place to be and with dramatic business benefits.

*“The problems we face today cannot be solved by the thinking that has caused them.” Albert Einstein*

It also has positive repercussions for initiatives like succession planning. You can model excellence within the role and expand that model to embrace whatever else is needed.

There are, of course elements we would not want to model – like a bad mood, or negativity. And we have all experienced negativity in action in our working careers. What is extraordinary, however, in the modelling process, is that if someone has the ability to continuously maintain a negative state, it shows an ability to maintain an emotional state that many of us would

love to know how to do – and knowing what we know about mapping behaviours across, maybe as they have a strategy for remaining in such a state, they can reverse and see what happens.

Longevity in positivism? Who knows!

(example inspired by Sue Knight)

## Acknowledgements

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## References and for further information on Modelling Excellence

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Dilts, Robert Modelling with NLP, Meta Publications, 1998

Knight, Sue NLP at Work, NB Publications, 2002

A source has been sought for the 'Unconscious Competence Model' but at the time of writing it was not available to the author who acknowledges it is not her original work.

## ea Consulting - Customer Experience Programmes

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As part of our ea Consulting Practice, ea Customer Experience enables organisations to deliver excellence in customer experience with every interaction made by your customers with your people. We transform your challenges into delivery, through rigorous change and project management.

We use innovative approaches to change management, which include blended learning, experiential learning, management psychology

techniques and actor role-play, to drive measurable KPIs and results.

## ea Consulting Group

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