

# hiring & retaining contact center agents



# purpose of this eBook

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At Jack Henry™, we put people first. We believe that if we take care of our associates, they'll take care of our financial institutions. The purpose of this eBook is to act as a guide and accountability tool as we make progress in several key areas and to clearly outline our approach to hiring, training, and retaining contact center agents. Each section focuses on a particular Jack Henry contact center objective and the related activities that will contribute to its success.

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**skilled & knowledgeable associates**

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Skilled and knowledgeable associates deliver results for our clients. We are focused on:

### Hiring well.

Recruiting talent is critical because in this business, people drive revenue. Consistent standards in the interview and hiring process provide a more uniform decision-making process that results in job offers to highly qualified candidates. These standards ultimately create a better candidate experience and lead to better hiring outcomes as we continue to seek out candidates with a strong customer service mindset. Hiring well also contributes to lower employee turnover, which allows the workforce to become more proficient in their jobs.

### Providing a thorough onboarding experience.

A good onboarding experience increases employee engagement and retention and acclimates them into Jack Henry's award-winning culture. Thorough and consistent new hire training programs along with assigned mentors ensure that each associate is ready to hit the ground running in their new roles after completion of their 6-week training program.

### Ongoing training.

Our goal is to have well-trained knowledgeable agents serving your accountholders, and the training doesn't stop after the orientation period is complete. The pace of change in the workplace is accelerating, so we recognize that training cannot be a one-and-done activity. Ongoing training programs ensure that associates keep their skills sharp and stay current on general best practices and company-specific procedures.

### Developing strong leaders.

Great leaders inspire their teams to do great work. A Gallup poll of more than 1 million people concluded that 75% of workers who quit their jobs did so because of their leader,<sup>1</sup> so it is more critical than ever to develop leaders who motivate associates while also building their teams' capacity and abilities. Ongoing leadership training is a strategic investment in our entire workforce that pays dividends in employee engagement, performance, and retention.



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# engaged associates

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**3.3x**

Engaged agents provide excellent customer service. We are laser focused on continually improving our service level standards. Fostering a positive culture within Jack Henry’s contact center is a key part of our people strategy.

According to McKinsey & Company, engaged and satisfied contact center employees are<sup>2</sup>:

- 8.5x more likely to stay than leave within a year
- 4x more likely to stay than dissatisfied colleagues
- 16x more likely to refer friends to their company

Engagement matters.

We continue to engage our Jack Henry Call Center associates by:

### **Fostering a fun and positive team culture.**

Jack Henry’s philosophy is to “Do the right thing, do whatever it takes, and have fun.” A fun and positive work environment is in not only in our company’s DNA, it’s good for business. According to a Gallup study, engaged employees make it a point to show up to work and do more work -- highly engaged

## **“High-involvement” approach:**

**3.3x** more likely to feel extremely empowered to resolve customer issues.<sup>3</sup>

business units realize a 41% reduction in absenteeism and a 17% increase in productivity. Engaged workers also are more likely to stay with their employers. In high-turnover organizations, highly engaged business units achieve 24% less turnover.<sup>4</sup> Additionally, a positive work environment is attractive to job seekers, which supports our goal of hiring well.

### Recognizing and rewarding performance.

People are intrinsically motivated by recognition. Employee recognition provider O.C. Tanner survey found that 37% of respondents said that more personal recognition would encourage them to produce better work more often.<sup>5</sup> We continue to leverage special incentives and programs to help motivate and keep our agents engaged.

### Demonstrating clear career paths.

Part of how we continue cultivating a “Best Places to Work” environment is by providing our associates with growth opportunities. When employees see these clear career opportunities, they are more likely to feel interested, challenged, and professionally curious and want to build their careers with Jack Henry.

The longer an employee stays with a company, the greater the return on the financial investment in hiring and training and the more experience available to serve our clients.

### Developing leaders as coaches.

Creating a culture of coaching leads to authentic relationships, increases employee engagement and productivity, and helps retain top talent. Jack Henry’s approach to managing performance hinges on consistent coaching

and feedback through regular one-on-one meetings between leaders and their teams as well as structured performance conversations. According to a recent Gartner study, high-quality coaching conversations lead to a 25% improvement in an employee’s performance, 40% increase in employee retention, and 29% stronger commitment to their employer.<sup>7</sup> A robust coaching curriculum teaches supervisors and managers how to lead well to maximize their team’s engagement and performance.

#### high-quality coaching conversations lead to:





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### **Supporting work-life integration.**

According to a 2021 study, 77% of remote workers report greater work-life balance. Additionally, offering a remote work option reduces absenteeism by at least 26% because employees are less likely to be exposed to sick coworkers, are better able to handle personal appointments without taking a full day off, and are less likely to need mental health days because of greater feelings of happiness in their jobs. Additionally, employees report sleeping better, eating healthier, and exercising more.<sup>7</sup> In addition to the benefits to the individual, this results in financial benefits to the employer, including through cost savings in employer-sponsored benefits programs.

### **Communicating effectively.**

Communication is one of the keys to success and is critical to employee engagement. Effective communication impacts team alignment around business priorities, employee morale, and productivity. Consistent, timely, and transparent communication not only creates awareness of important topics in the workplace, it also builds trust between associates and leadership.

### **Listening to the voice of the associate.**

Communication is not one-way. Another way to build trust is to listen to what our associates are saying. This contributes to a strong culture of integrity, respect, and appreciation. Our “Listening Strategy” provides a variety of opportunities and channels for employees to share ideas, thoughts, and concerns with their supervisors as well as senior leadership. Listening leads to employee buy-in, engagement, and adaptability to change, and it provides our company with valuable insight by tapping into the wider experiences and perspectives of our workforce.

# **well-managed workforce**

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To be successful for the long run, we must have the right people with the right skills in the right place at the right time. Our strategy to hire the right people and build the right skills has been outlined in the previous sections. The Jack Henry Workforce Management Team is focused on ensuring that we get the place and time right, knowing how many people are needed and when. We are partnering with our clients to understand their timelines for growth so that we can position our staffing to best support that growth.

We are addressing current needs and planning for the long-term by:

### **Ensuring current staffing needs are met.**

This means paying close attention to accountholder trends and behaviors and collaborating with our clients so that we have a full understanding of current needs. We must have enough agents and supervisors to effectively manage current call volume and meet defined service level standards. However, this goes beyond hiring and includes reviewing our reporting structure, compensation, training needs, scheduling process, and more.

### **Creating a data-driven plan for future staffing needs.**

Building and retaining a successful workforce for the long-term requires planning. By partnering with our Human Resources team, we can leverage strategic and continuous workforce planning tools that will enable us to prepare for the future, from budgeting and training agents to preparing leaders and examining organizational structures. Having a clear understanding of, and plan for, future staffing needs will set us up for success over the long haul.

### **Galvanizing a remote work strategy.**

Workplace needs underwent a dramatic shift in 2020 due to the COVID-19 pandemic, which required businesses to quickly respond and adopt more flexibility in work location. While call centers face unique challenges with a work-from-home setup, these challenges can be overcome with an intentional strategy. This includes ensuring associates have the tools they need to be successful and open lines of communication with their leaders. There are considerable benefits of implementing a

remote work strategy for parts of our workforce. Remote workers average a 15% increase in productivity and lose 35 minutes less each day due to interruptions.<sup>8</sup> Remote work supports healthy work-life integration for associates, reduces costs, and allows us to hire the best employees, regardless of geographic location.



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**measurable results**

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It is frequently said that you get what you measure, and if you can't measure it, you can't improve it. We have taken and continue to expand on intentional steps to gauge our progress against all these efforts outlined in the previous objectives. Our measuring tactics include:

### **People dashboard.**

Developing meaningful key performance indicators (KPIs) related to things like hiring, employee turnover, and promotion rates can provide valuable insight into the success of our people strategy and highlight areas of strength and opportunity.

### **Qualitative indicators.**

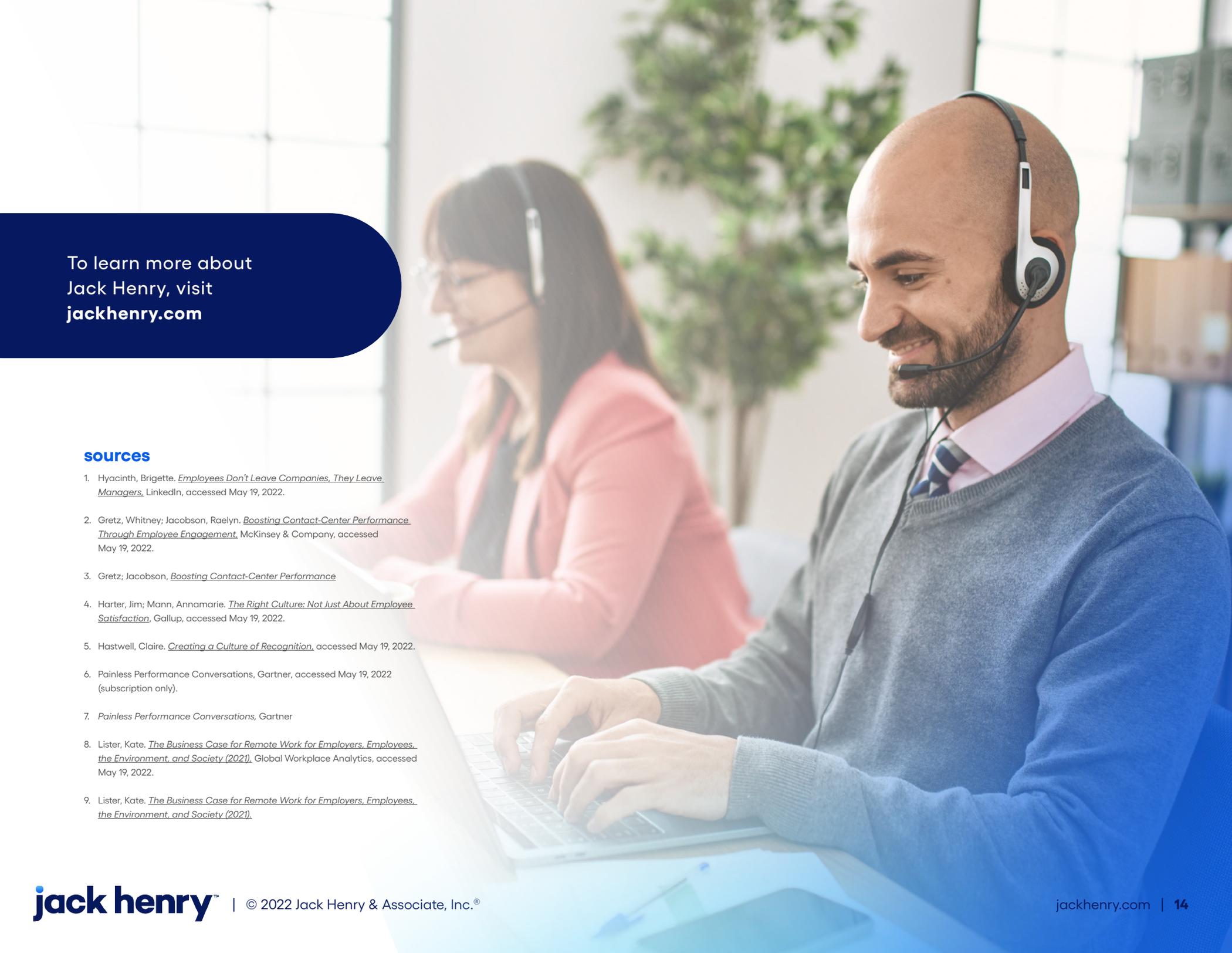
In addition to quantitative KPIs, it is important to capture qualitative information. One way to do this is through an employee listening strategy designed to engage with employees, harness their ideas and feedback, and respond.

### **Balanced scorecard.**

A balanced scorecard is a tool to track the execution of activities and monitor the results of those activities. It is important for both associates and leaders to have a baseline understanding of the performance indicators reflected in the balanced scorecard, how they are measured, and why those metrics are important. Examples of metrics can include call quality, average handle time, average wait time, and adherence.

### **Regular metrics review.**

Reviewing the data we collect on a structured and consistent basis allows us to identify what is working well, what is not working well, and opportunities to improve.

A photograph of a call center environment. In the foreground, a man with a beard and a blue sweater is smiling while wearing a headset and typing on a laptop. In the background, a woman with glasses and a pink blazer is also wearing a headset and working at a desk. The office has large windows and indoor plants.

To learn more about  
Jack Henry, visit  
[jackhenry.com](https://jackhenry.com)

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