

PERFORMANCE MATTERS:

The NICE Guide to Performance Management in the Contact Center

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In today's constantly fluctuating business world, performance management can align an entire firm, from front line employees to executives in the C-suite, around a central mission and goal. Many factors affect the success of performance management initiatives, but none is more powerful than knowledge.

The Performance Matters ebook shares key trends, strategies and resources to help employees excel:

- Data-driven solutions
- Employee segmentation
- Goal setting
- Coaching
- Gamification
- Personalized engagement

Learn about the best practices that will allow you to reshape your contact center to optimize performance and meet—or exceed—your organizational objectives. You'll also get access to a bonus list of more than 40 references from Harvard Business Review, Fortune, Fast Company and more, for further reading.

Prepare to rethink performance.

Your contact center needs improvement. Not because it's inefficient or unsuccessful, but because today's rate of technological development means that without active intervention, it will be.

Performance management both drives and responds to the business environment. In the simplest terms and most convenient definitions, it provides a framework for employees and managers to collaborate to improve, thereby adding value to an organization.

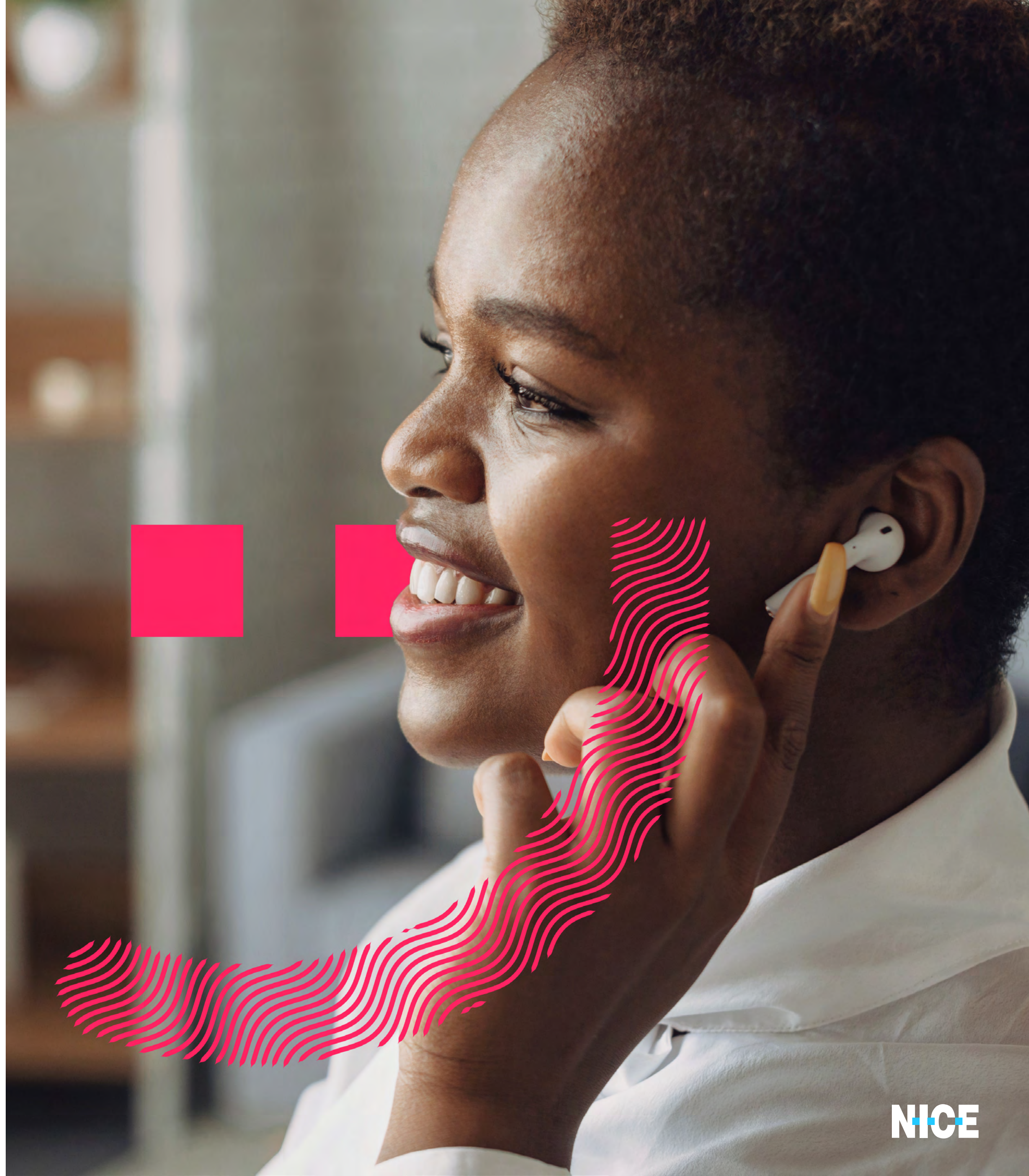
The process is encompassing and ongoing. Users operationalize data to increase transparency and accountability in ways that were inconceivable a generation ago. Implementation strategies, including coaching, gamification and goal-setting, empower and motivate agents on the job.

Leading organizations know that performance management can directly impact the bottom line and that those results are long-lasting and quantifiable. The methodological approach underpinning performance management optimizes efficiency, increases workplace satisfaction and avoids many of the biases and pitfalls of human nature that accompany traditional performance review processes. At least half of Fortune 1000 companies are expected to drop numerical rank categories for data-driven performance metrics over the next few years.¹

Many factors affect the success of performance management initiatives, but none is more powerful than knowledge. Managers and agents who work to understand the strategies and science behind the buzzword will see the most benefit. This ebook is worth more than a skim. Whether you're a long-time user of performance management strategy or new to the methods, prepare to rethink performance.

¹ Kris Duggan, "Why the Annual Performance Review is Going Extinct", Fast Company, <https://www.fastcompany.com/3052135/the-future-of-work/why-the-annual-performance-review-is-going-extinct>





Performance Reviews vs. Performance Management

Nearly 10 years ago, Harvard Business School professor James L. Heskett **noted** that performance reviews “rank alongside root canal dental work on our list of things we look forward to as managers and employees.”² Yet despite near-universal frustration with the process, the HR-mandated performance review has long been a mainstay in the modern business world.

It seems that this vestige of last century’s 9 to 5 is finally on its way out, however, with the traditional performance review now under the microscope. And while some firms have taken advantage of workers in a high-unemployment market, more and more are recognizing the importance of people, “**the fifth P**”, in maintaining a successful brand.³

A shift in employee management

Google, Adobe and Microsoft have all stepped away from conventional performance reviews, but it’s not only trendy tech firms that are making the switch: GE and Deloitte also have opted to retire their long-standing review processes. These companies are not reinventing the wheel, though. Businesses gather oceans of data on their customers—their interests, their social connections and the kinds of promotions they respond to, for example—and have made an art of the customized consumer experience. Today, a growing number of organizations are realizing that the same data-driven process can be used internally, just as effectively, to maximize team output, productivity and engagement through innovative coaching and management practices.

² Jim Heskett, “What’s to Be Done About Performance Reviews?”, Harvard Business Review, <http://hbswk.hbs.edu/item/whats-to-be-done-about-performance-reviews>

³ William J. McEwen, “The Fifth P”, Gallup, <http://www.gallup.com/businessjournal/799/power-fifth.aspx>



Big data in action

Performance management takes employee assessment out of HR's filing cabinet and moves it into the workroom. In leveraging a more data- and analytics-driven performance management approach, organizations are realizing a number of benefits that range from greater employee engagement to the ability to respond to the increasing pace of change in today's business environment.

When ING Direct USA adopted a performance management system for its call centers, the organization collected data on everything from call content and call time to employee longevity.⁴ Much of this personalized data across key performance indicators (KPIs) was available to each team member, and the transparency and actionable insights created an atmosphere of accountability and motivation that challenged them to self-correct. Because managers could see those same numbers, they were suddenly able to provide valuable frontline coaching for their staff. The data also allowed them to pinpoint employee weaknesses and provide support in those specific areas, rather than assign entire teams to formulaic training programs. The ongoing performance execution plan allowed ING to replace one-size-fits-all goals with individualized, realistic targets.

The result? The call center's productivity increased, with After-Call Work (ACW) reduced by 11 seconds per call. Calls-to-sale decreased by more than two calls on average, and ING Direct USA found itself in the No. 2 spot on Forrester Research's Customer Experience Index in 2012. Since then, the firm has automated a wide range of performance improvement activities, including coaching. The data-informed methods also limit the impact of bias and personal dynamics that can plague performance review.



“The data also allowed them to pinpoint employee weaknesses and provide support in those specific areas, rather than assign entire teams to formulaic training programs.”

⁴ “ING Case Study”, NICE, http://www.nice.com/sites/default/files/nice_ing_direct_nt_convert.pdf



Forward-tinking employee improvement plans

Some experts are now predicting that at least half of Fortune 1000 companies will drop numerical rank categories for data-driven policies over the next few years.⁵

By and large, the decision to adopt a performance management approach isn't just to keep up with the GEs of the world, as performance management is far more than a substitute for traditional human resources. It's a way to align an entire firm, from front line employees to executives in the C-suite, around a central mission and goal. To stay ahead in today's constantly fluctuating business world, an organization needs to be attentive, agile and focused.

That's the beauty of **the data-driven approach**: It is fair, it is efficient, and it yields concrete results. It can be put to work in nearly every industry.⁶ It supports a range of proven methods that promote a dynamic team culture of continuous performance improvement.

And the side benefit? You're unlikely to hear your organization's performance management system compared to dental surgery.



“[Performance management is] a way to align an entire firm, from front line employees to executives in the C-suite, around a central mission and goal.”

⁵ Kris Duggan, “Why the Annual Performance Review is Going Extinct”, Fast Company, <https://www.fastcompany.com/3052135/the-future-of-work/why-the-annual-performance-review-is-going-extinct>

⁶ “Performance Management”, NICE, <http://www.nice.com/engage/workforce-optimization/performance-management>



For High-Performing Teams, Spend Less Time Worrying About Your Worst Performers

It's no secret that modern businesses run on tight budgets, and funding for training and staff development can be scarce. When companies demand constant justification for every development dollar spent, managers struggle with the decision of where to direct their resources.

Which employees will gain the most from added support and coaching, and how can you identify them?

Using segmentation as a performance management tool

One effective approach to assessing team performance is stack ranking, which divides the team into quartiles. Imagine a box plot representing the performance of your organization's staff on key metrics: The first quartile of top performers are at one end, followed by a segment of employees whose performance meets expectations, then employees

who need improvement. At the far end are the team members who are truly struggling—the bottom 25 percent of your organization in terms of performance.

Too often, managers relying on metrics focus on this bottom quartile of employees—the ones who are far from meeting expectations—with goal-setting exercises, coaching and other management interventions.

The real opportunity, however, lies in applying these tools to the middle segments, which represent half of the workforce, to help them perform as the top employees do. These two quartiles are rarely high-performing enough for leadership recognition or incentives, yet they are not far enough behind to warrant significant action or termination.

They have clearly demonstrated some skills and interest, but they are not providing the highest level of value in the workplace.

Industry-leading organizations routinely focus their coaching efforts on second- and third-quartile performers who have the potential to become top performers. It's a philosophy that was embraced by Jack Welch, legendary former CEO of GE. Welch believed in the value of the mid-level performer: "You do not want to lose the vast majority of your middle [employees]—you want to improve them," he wrote in his 2005 book, "Winning."

Welch knew then what data and segmentation are only now proving: The middle group may very well include the next star performers who, with a little prompting, can become leaders.

According to the Corporate Executive Board, companies tend to spend too much time coaching the top 20 percent and trying to improve the bottom 20 percent of sales and customer service representatives.⁷

Focusing on the core middle is the best way to improve profits—for this group, high-quality coaching can improve **performance up to 19 percent**.⁸

"The middle group may very well include the next star performers who, with a little prompting, can become leaders."

⁷ David Anderson, "What's the ROI of Skill Development?" CEB Global, <https://www.cebglobal.com/blogs/whats-the-roi-of-skill-development-2/>

⁸ Matthew Dixon and Brent Adamson, "The Dirty Secret of Effective Sales Coaching", Harvard Business Review, <https://hbr.org/2011/01/the-dirty-secret-of-effective>



Nurturing high-performing employees

High-performing employees share three universal characteristics, according to a **Gallup study released last year**: “Employees who hit the trifecta of tenure, engagement and talent perform 18 percent higher than the average employee and 35 percent higher than a worker who goes zero for three.”⁹ Acquiring talented staff is a hiring and human resources question, outside the reach of many managers, but an on-the-ground supervisor has some real power over the other two factors.

Engagement and tenure can be nurtured in the easily accessible preexisting employee population. The team is already present, so **managers and supervisors can work with individuals** to develop realistic goals for improved performance.¹⁰ By definition, these team members already have the benefits of on-the-job experience, including acquired knowledge of the company and industry. They are perfectly positioned to grow and prosper when given appropriate goals—and the tools needed to achieve them.

By setting up short-term goals and having ongoing conversations surrounding them, the modern organization can reinforce the notion that anyone can become a top performer.

⁹ Jim Harter, “Companies Are Maximizing Only 5% of Their Workforces”, Gallup, <http://www.gallup.com/businessjournal/182087/companies-maximizingworkforces.aspx>

¹⁰ “Employee Coaching Workbook for Supervisors”, NICE, <http://www.nice.com/engage/eBooks/Employee-Coaching-Workbook-for-Supervisors-24>



Better Performance Management with the Right Goals

A few years ago, Sony set an ambitious goal of zero environmental footprint by 2050. The company dubbed this mission its “Road to Zero,” breaking the goal up into several pieces, each of which included specific, measurable targets that involved employees at each level of the organization.

“You get the sense that executives have clearly thought this through,” author Andrew Winston wrote about the initiative in the Harvard Business Review.¹¹ “They seem to realize that a big goal, just hanging out there on its own, would be far too daunting, nebulous and not very actionable.”

The proven effects of goals

The value of setting goals has long been proven. In fact, asserts [Inc. magazine](#), there is perhaps no research finding in the field of organizational psychology that has been more solidly established.¹² The research can be boiled down to a few key areas: difficulty, specificity and proximity of goals. Goals that are specific and moderately difficult improve performance more than those that are vague and too difficult or too easy. Goals are more effective when they have clear target dates, regardless of whether they are short- or long-term, and goals must be measurable. In short, they must be SMART (Specific, Measurable, Achievable, Relevant and Time-bound.)

Hundreds of studies around the world have consistently demonstrated that setting specific, challenging goals can powerfully drive behavior, boost performance and increase achievement. Setting goals increases success rates in a wide variety of settings: For example, one goal-setting intervention with college students led to a 30-percent increase in academic performance over the control group.¹³



“Hundreds of studies around the world have consistently demonstrated that setting specific, challenging goals can powerfully drive behavior, boost performance and increase achievement.”

¹¹ Andrew Winston, “Sony’s Goalsetting and the Value of Zero”, Harvard Business Review, <https://hbr.org/2010/06/sonys-goalsetting-and-the-value.html>

¹² David Van Rooy, BSQ: “The Only Goal-Setting Framework You Will Ever Need”, Inc, <http://www.inc.com/david-van-rooy/the-only-goal-setting-framework-you-will-ever-need.html>

¹³ S. Turkay, “Setting Goals: Who, Why, How?” Harvard Business Journal, <https://hilt.harvard.edu/files/hilt/files/settinggoals.pdf>



Goals as a performance improvement plan

Depending on a business' needs, a data-driven approach can challenge team members to work towards incredibly specific key performance indicators (KPIs). For example, in the contact center industry, this could be as individualized as a personal goal for a contact center agent to raise his or her customer satisfaction KPI by 12 percent in a given region. It could include team goals as well, because research has found a combination of compatible group and individual goals to be more effective than individual or group goals alone. The more specific the goal, the more direction each employee has. By challenging the team and letting them know what you want, you'll see faster and more concrete results.

Goals also offer a range of less easily measured benefits: They can clarify expectations about employee performance, relieve boredom in repetitive or monotonous jobs and increase job satisfaction when goals are met. Team members who have a clear view of the expectations and needs of their companies receive higher customer service scores, show productivity gains, maintain higher rates of compliance and increase retention.

Goal-setting's effects on employee engagement

Goals are also a powerful driver of employee engagement. In fact, a study conducted by Harvard Business Review found that 69 percent of employees felt that business goals that are effectively communicated and understood have the largest effect on employee engagement.¹⁴ To do so is easier said than done, however: A Gallup poll found that 50 percent of employees worldwide don't truly understand what is expected of them on the job.¹⁵

Goals that are SMART can be applied to nearly every aspect of life and business, from weight loss to corporate restructuring. They work just as well on the macro level as they do for individual employees or a single project.

Moving forward with performance management

Regardless of the behavior you are trying to improve, goal-setting is a critically important component of providing **ongoing feedback**.¹⁶ By establishing and measuring KPIs tied to overall business goals, you can give your employees real-time input on their performance while coaching them to achieve more. When employees feel noticeable progress towards aggressive goals, they become more fulfilled, less likely to burn out and more confident in their abilities to achieve those goals and contribute to the company's overall success.

A management tool for strengths and weaknesses

SMART goals can be applied to strengths or weakness, or both concurrently, depending on the performance context. For example, for several years now, the coaching industry has focused on developing employees' strengths with SMART goals, but Columbia University Professor Tomas Chamorro-Premuzic argues that coaching interventions that focus on specific faults or weaknesses of employees are even more effective. Helping people bridge or reduce the gap between their ideal self and their actual self can improve behaviors and even trait-like dispositions by 30 to 40 percent, Chamorro-Premuzic told the **Harvard Business Review**.¹⁷

It's not that your managers should ignore their team members' strengths; rather, they should take a balanced approach that considers strengths in relation to the larger group and not relative to an individual's range of abilities, Chamorro-Premuzic believes. With this approach, a manager might choose to address an employee's best KPI first, if it is average or below average when compared to those of his or her peers; in the context of the team as a whole, it is in fact an objective weakness.

“The more specific the goal, the more direction each employee has.”

¹⁴ Analytics services, “The Impact of Employee Engagement on Performance”, Harvard Business Review, https://hbr.org/resources/pdfs/comm/achievers/hbr_achievers_report_sep13.pdf

¹⁵ Jim Harter, “Obsolete Annual Reviews: Gallup's Advice”, Gallup, <http://www.gallup.com/opinion/gallup/185921/obsolete-annual-reviews-gallup-advice.aspx>

¹⁶ “Performance Management”, NICE, <http://www.nice.com/engage/workforce-optimization/performance-management>

¹⁷ Tomas Chamorro-Premuzic, “Stop Focusing On Your Strengths”, Harvard Business Review, <https://hbr.org/ideacast/2016/01/stop-focusing-on-your-strengths>



Coaching for Performance Management

How organizations are using coaching to transform workforce performance

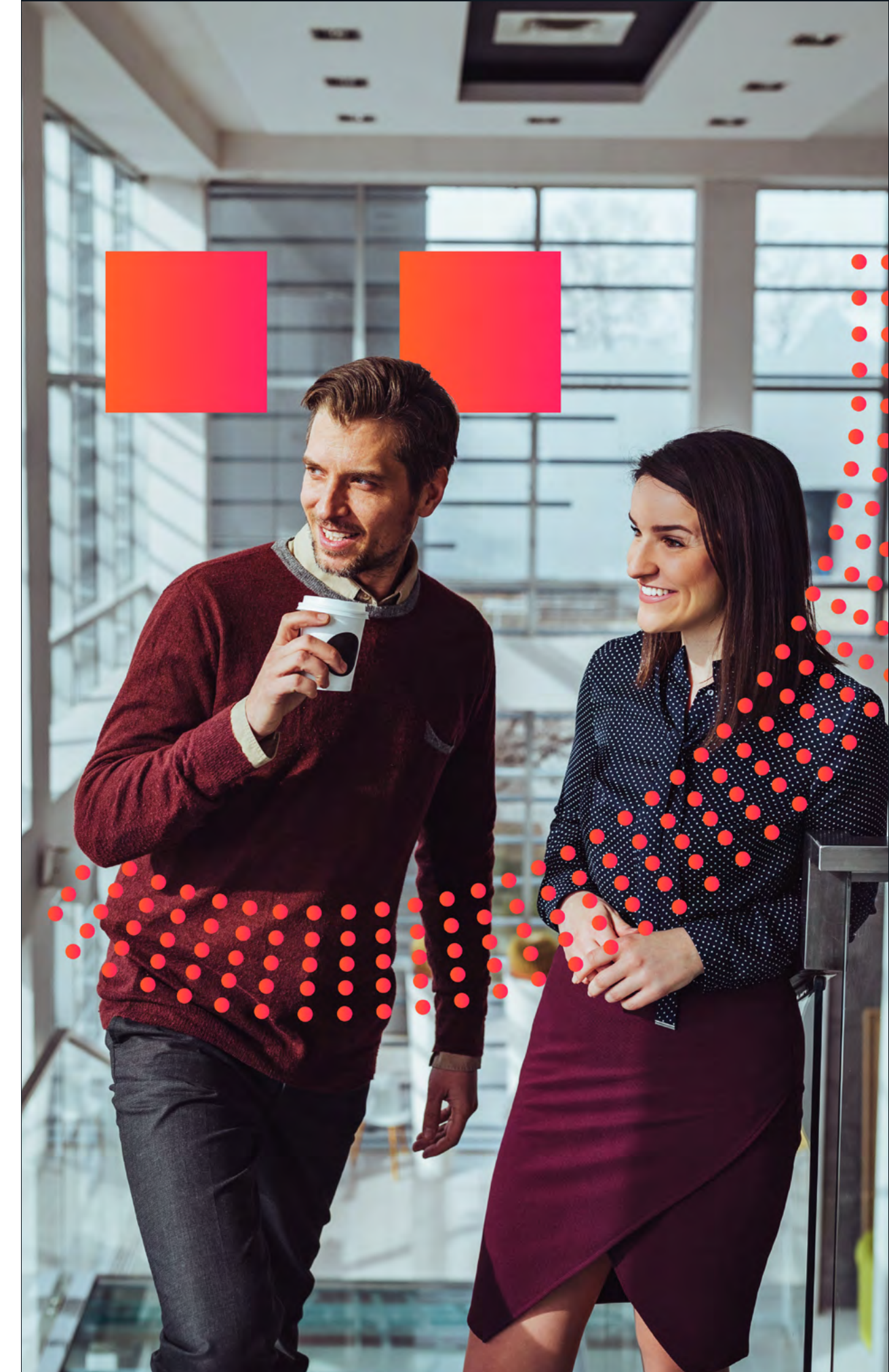
When asked about his success over his 31-year career at Whirlpool, CEO Jeff Fettig echoes a refrain often cited by executives behind the world's leading companies.

"I am here today in part due to a handful of people who, before it was in vogue, provided coaching and mentoring to me early in my career. That helped me to develop," Fettig told Forbes.¹⁸

Fettig's experience isn't unique, but he is one of the lucky ones: Although more than 60 percent of organizations use some form of internal coaching, according to a survey conducted by the Conference Board, far too often coaching is a small part of the job description for most managers. Nearly half spend less than 10 percent of their time coaching others.¹⁹

"You can't be a great manager if you're not a good coach," management professor Monique Valcour asserts in an article for the **Harvard Business Review**.²⁰

Being a coach doesn't come naturally to everyone, though. For many people, exposure to a coach has been limited to time spent playing youth sports, years or decades earlier. As a result, coaching in the workplace can feel overwhelming and confusing.



"Excellent coaches know how to provide learners with the tools, feedback and opportunities necessary to improve and learn—and to do so without providing the answers themselves."

¹⁸ Geoff Colvin, "How Top Companies Breed Stars", Fortune, http://archive.fortune.com/magazines/fortune/fortune_archive/2007/10/01/100351829/index.htm

¹⁹ Candice Frankovelgia, "The Key To Effective Coaching", Forbes, <http://www.forbes.com/2010/04/28/coaching-talent-development-leadership-managing-ccl.html>

²⁰ Monique Valcour, "You Can't Be a Great Manager If You're Not a Good Coach", Harvard Business Review, <https://hbr.org/2014/07/you-cant-be-a-great-manager-if-youre-not-a-good-coach>



Coaching vs. Managing

Coaching is the process of prompting improvement and growth in key performance indicators, whether related to efficiency, customer satisfaction metrics or a young athlete's long jump. True coaching is an interactive process, and it requires **willingness on the part of the recipient to change**.²¹ It should prompt, urge, train, motivate, guide, facilitate and instruct. Excellent coaches know how to provide learners with the tools, feedback and opportunities necessary to improve and learn—and to do so without providing the answers themselves.

Managers frequently confuse feedback and coaching. Feedback is reactive, reflective and focused on information and data. Coaching is forward-facing and proactive, and it should direct attention towards tools and processes.

The two are linked, though. Feedback creates self-awareness; without knowing about their past performance, employees won't understand how to move into the future. Effective coaching not only incorporates feedback about the past but also involves the development of plans for the future—i.e., an employee's goals.

Goals are also a unique but independent component of coaching and the associated performance improvements.²² Setting goals that are SMART (specific, measurable, achievable, relevant and time-bound) gives coaches and learners a direction and plan and can have a powerful impact on performance. The emphasis on goals should also underscore that coaching is a process, not an evaluation.

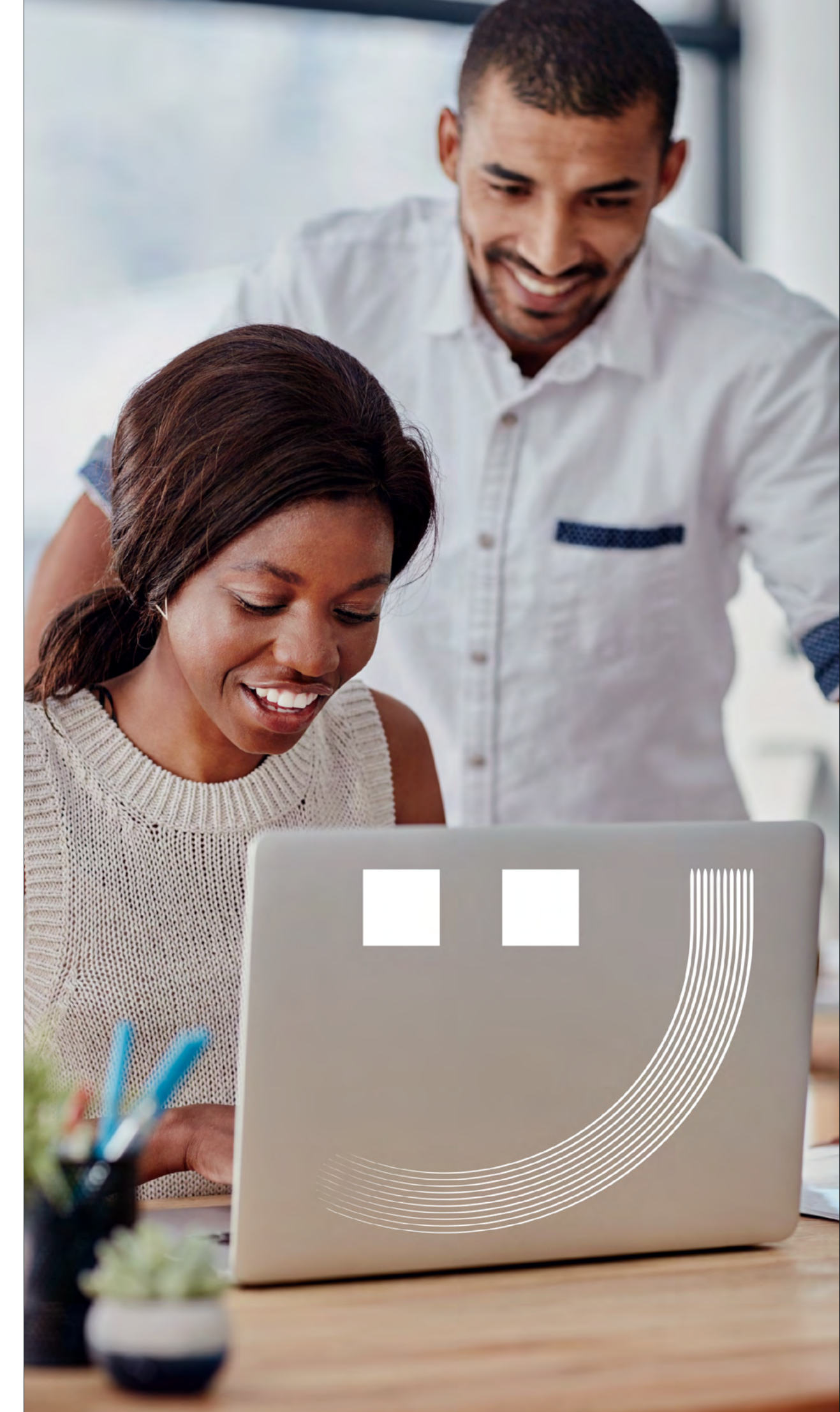
Increasing recognition of the importance of employee coaching

Coaching has a long history in sports and education, but its application in management environments is comparatively young. In recent decades, however, it has seen a surge in popularity. This growing interest is evidenced by the burst of professionals providing organizational, individual and personal coaching. Membership in the International Coaching Federation, which promotes professional standards and ongoing education among its members, is currently growing by more than 500 members every month, and the organization has offices on five continents.²³

²¹ Diane Coutu, Carol Kauffman "What Can Coaches Do for You?" Harvard Business Review, <https://hbr.org/2009/01/what-can-coaches-do-for-you>

²² Adam Aftergut, "Better Performance Management with the Right Goals", NICE, <http://www.nice.com/engage/blog/Better-Performance-Management-with-the-Right-Goals-2162>

²³ International Coach Federation, <https://www.coachfederation.org/>



**“Coaching is a process,
not an evaluation.”**



A powerful tool to improve employee performance

Countless organizations are seeking to incorporate coaching strategies and structures into their operations, and many have seen remarkable results. When used correctly, coaching has been proven to enhance KPIs across industries and demographics. The business implications—and the opportunities—are vast.

- Consider the coaching program at Oregon State University.²⁴ Among employees who received coaching, 92 percent experienced an increase in confidence and discovered possibilities they would have missed on their own.
- When Waste Management, the leading provider of comprehensive waste management services in North America, introduced a new coaching initiative, the company saw improvements on a range of KPIs within four months: coaching compliance soared from 25 percent to 79 percent, and quality scores increased nearly five percentage points.²⁵
- Research published in the Leadership and Organization Development Journal found that coaching increases leadership effectiveness by as much as 60 percent.²⁶

Empowerment through workplace coaching

Giving supervisors the opportunity to own the coaching process is a critical part of successful performance improvement. Not too long ago, multinational imaging and electronics company Ricoh relied on manual systems for its call centers.²⁷ With three U.S. locations employing 300 agents who handled 2.4 million calls annually, the company needed to move toward a more efficient, automated process and improve KPIs, and it turned to a performance management system to effect change.

The turnaround was remarkable: By automating scheduling and performance data processes, it freed up supervisors to focus on higher value activities, including coaching. It also allowed Ricoh to standardize and streamline those coaching and management strategies. The results of the initiative included an 83 percent improvement in average speed of answer, and a 75 percent improvement in abandonment rate. During the process, the company learned the importance of strategic, methodical and informed coaching. Ricoh saw improvements when it not only **empowered employees** but also the people coaching them.²⁸

Limitless potential as a workforce optimization resource

Coaching is a tremendous tool for organizational success. The company that is intentional about aligning the goals of the business with a coaching program and tools can empower its managers to inspire and engage employees to move the entire workforce toward peak performance.

²⁴ Office of Human Resources, "Performance Coaching", Oregon State University, <http://hr.oregonstate.edu/coaching/results-and-impact-coaching>

²⁵ "Waste Management Case Study", NICE, [http://www.nice.com/optimizing-customer-engagements/Lists/CustomerSuccesses/Attachments/115/WasteManagement_Case_Study_\(2015\).pdf](http://www.nice.com/optimizing-customer-engagements/Lists/CustomerSuccesses/Attachments/115/WasteManagement_Case_Study_(2015).pdf)

²⁶ Elizabeth C. Thach, "The impact of executive coaching and 360 feedback on leadership effectiveness", Leadership & Organization Development Journal, <http://www.emeraldinsight.com/doi/abs/10.1108/01437730210429070>

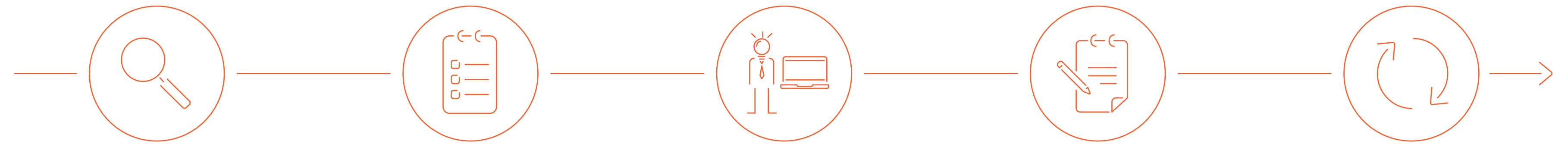
²⁷ "Ricoh Case Study", NICE, <http://www.nice.com/sites/default/files/ricoh.pdf>

²⁸ "RTA Innovation", NICE, <https://www.youtube.com/watch?v=BJO2oA9kx7E>



Five steps for effective workplace coaching

Nearly 90 percent of organizational leaders believe the manager's most important role is to coach, according to a Contact Center Council survey, but organizations frequently fail to arm their supervisors with tools and time to do so. Focusing on five key steps of coaching will give managers and supervisors a solid foundation from which to inspire and engage employees to perform better across all KPIs.



Analyze

Collect and interpret performance data and **segment employees** by performance. Identify unique performance gaps for the individual employees who will be coached, then drill into the root cause behaviors behind each gap.²⁹

Prioritize the highest impact opportunities for improvement. Ensure that the organization is using the best metrics, ones closely aligned to the desired behaviors—they're essential for measuring change.

Prepare

Before a session, set the coaching session objective, focusing on one or two behaviors per meeting. Plan the interaction, anticipating objections and preparing to overcome them. Consider what feedback to deliver—for example, employees believe corrective feedback does more to improve their performance than positive feedback, by a three-to-one margin—and be respectful of individual characteristics or needs,³⁰ Coach to behaviors, rather than metrics: Helping an employee learn to show empathy during a customer interaction is far more effective than simply telling him to improve his Customer Satisfaction score by five points.

Conduct

During the session, ask questions to open the dialogue, share perspectives and insight and determine options to move forward. Coaching is a two-way communication process that requires that the supervisor and the employee both be fully **engaged and motivated**.³¹

Document

Set specific measurable goals, agree on next steps in terms of actions and timing, and gain a commitment. Follow the employee's progress. Over time, create a list, wiki or library of best practices and learning tips based on experience and employee input.

Follow up

Wash, rinse, repeat. Coaching is a process, not a one-time evaluation.

²⁹ Adam Aftergut, "For High-Performing Teams, Spend Less Time Worrying About Your Worst Performers", NICE, <http://www.nice.com/engage/blog/For-HighPerforming-Teams-Spend-Less-Time-Worrying-About-Your-Worst-Performers-2157>

³⁰ Jack Zenger, Joseph Folkman, "Your Employees Want the Negative Feedback You Hate to Give", Harvard Business Review, <https://hbr.org/2014/01/your-employees-want-the-negative-feedback-you-hate-to-give/>

³¹ Diane Coutu, Carol Kauffman, "What Can Coaches Do for You?" Harvard Business Review, <https://hbr.org/2009/01/what-can-coaches-do-for-you>

"Coaching is a two-way communication process that requires that the supervisor and the employee both be fully engaged and motivated."



The value-add of performance management tools

Coaching takes time, skill and planning, and the measure of a coaching session's success lies in its results: If it doesn't lead to change in the desired behaviors, it hasn't been effective. To coach well, managers need a transparent, single source of truth: one solution that aggregates data from across the organization (so they don't have to).

Having access to the same set of metrics allows the employee to make his or her own decisions, problem-solve and actively develop skills on the job. Investing in the tools that give your employees immediate input on their performance while coaching them to achieve more will help ensure your organization improves upon its most mission-critical goals.

“If it doesn't lead to change in the desired behaviors, it hasn't been effective.”



Getting Gamification Right

Telecom customers' operating systems, devices and service plans change frequently, and call center representatives are constantly challenged to stay up to date. T-Mobile's customer service teams are no exception, and when the global wireless network operator's employees were struggling with a legacy knowledgebase, the company turned to a social knowledge-sharing platform.

A knowledge-sharing platform only works if it is used, so T-Mobile incorporated gamification to enable problem solving and foster participation. "Players" earned points for using the system correctly and awards for contributing their own knowledge. The interactive platform drove both competition and collaboration between team members, and T-Mobile saw substantial results: Participation among employees in the knowledge-sharing platform increased by 96 percent, contributions by 583 percent and responses by 783 percent.



Defining gamification

Gamification applies video game mechanics in non-game contexts. It can be used at individual and team levels, at home or at the gym, in the classroom or in the workplace. In business settings, it is generally used to engage employees and improve performance. It scales well and makes work increasingly fun.

Gamification, however, isn't about turning everything into a game, as the author of the "The Gamification Revolution", Gabe Zichermann, told **CIO magazine**.³² It's about using the best ideas from games, like loyalty programs and behavioral economics, to drive the behavior that businesses want to encourage in their employees. When tied to relevant KPIs and employee goals, gamification helps companies incent the type of behaviors that drive results.

"Gamification engages people at an emotional level, which is far more powerful than typical transactional engagement strategies," explains Brian Burke, author of Gamify: How Gamification Motivates People to Do Extraordinary Things.³³

Most managers are now aware of the benefits of employee engagement, but many have struggled to drive it. A Gallup study found that only 30 percent of the U.S. workforce is engaged in their work.³⁴ That same report revealed that employee engagement improves a long list of metrics: customer ratings, profitability, productivity, turnover, shrinkage (theft), absenteeism, and quality.

Gamification, when applied correctly, can increase engagement dramatically. For example, researchers at Finland's University of Tampere identified a positive link between reward badges and increased work activity,³⁵ and psychologists have **demonstrated the cause-effect relationship** between video game stimuli and the pleasure circuit associated with the neurotransmitter dopamine.³⁶

Many companies are already using gamification to teach employees processes and procedures, improve productivity and reach revenue goals. At Hyatt Hotels, the goal of gamification is to establish on-the-job goals, reward customer-service employees and provide incentives.³⁷ At Xerox, gamification is used to train new hires to its sales teams.³⁸

"A Gallup study found that only 30 percent of the U.S. workforce is engaged in their work."

³² Rich Hein, "How to Use Gamification to Engage Employees", CIO Magazine, <http://www.cio.com/article/2453330/careers-staffing/how-to-use-gamification-to-engage-employees.html>

³³ Brian Burke, "Gamify: How Gamification Motivates People to Do Extraordinary Things", Amazon, <https://www.amazon.com/Gamify-Gamification-Motivates-People-Extraordinary/dp/1937134857>

³⁴ "70% of U.S. Workers Not Engaged at Work", Gallup, <http://www.gallup.com/services/178514/state-american-workplace.aspx>

³⁵ Juho Hamari, "Does gamification work?" Gamification Research Network, <http://gamification-research.org/2013/09/does-gamification-work-a-look-into-research/>

³⁶ David J Linden Ph.D. "Video Games Can Activate the Brain's Pleasure Circuits", Psychology Today, <https://www.psychologytoday.com/blog/the-compass-pleasure/201110/video-games-can-activate-the-brains-pleasure-circuits-0>

³⁷ John Brandon, "3 enterprise gamification success stories", CIO Magazine, <http://www.cio.com/article/2900319/gamification/3-enterprise-gamification-success-stories.html>

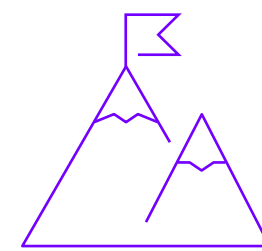
³⁸ John Brandon, "3 enterprise gamification success stories", CIO Magazine, <http://www.cio.com/article/2900319/gamification/3-enterprise-gamification-success-stories.html>



The basics of gamification

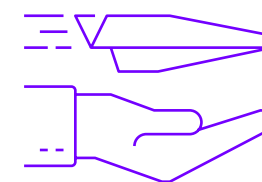
As with reward badges, most of the techniques used for gamification are simple. They include features like level progress, points and scores, real-time performance feedback, progress bars, activity feeds, team contests, virtual gifts, avatars and an online marketplace. These same tools appear in video games and board games alike. Each is designed to lead employees to an end goal.

To succeed, gamification must accomplish three key objectives:



Motivate

People are driven by intrinsic motivation (for example, a personal interest or a sense of accomplishment) and extrinsic motivation (prizes, praise, and recognition). Gamification can develop both to motivate employees to perform at higher levels than ever before.



Entertain

Gamification keeps participants engaged and entertained. A salary.com survey found that 23 percent of employees waste time at work because they're bored.³⁹ Employees who are engaged and having fun will stick to the task and accomplish more.



Compensate

Rewards and compensation are essential to successful gamification. A reward can be as simple as a virtual thumbs-up or as significant as a major bonus. People naturally seek out recognition, and compensation increases their commitment to a project or goal.

³⁹ Aaron Gouveia, "Wasting Time at Work 2012", Salary.com, <http://www.salary.com/wasting-time-at-work-2012/>

⁴⁰ NICE, "Gamification: Engage and Motivate Your Employees," <http://www.nice.com/engage/eBooks/Employee-Engagement--Gamification-25>

Aligning gamification and performance improvement

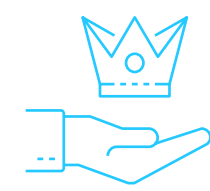
Gamification is much more than rewards and badges; for any gamification project to succeed, an organization needs to align the goals of players with those of the business itself. Reliable and relevant metrics connected to the company's top priorities keep management informed about ROI and performance, whether the goal is to boost first-call resolution (FCR) rates or reduce average handle time (AHT). Large-scale, successful workplace gamification needs to be adaptable and serve a real purpose.

When organizations get gamification right, **the effect is powerful:** up to a 25 percent increase in productivity, a 90 percent reduction in training time and a 70 percent reduction in the cost to onboard a new hire.⁴⁰ Providing agents with goals, real-time feedback and rewards that matter can transform the performance of your organization.

"For any gamification project to succeed, an organization needs to align the goals of players with those of the business itself."



10 Mechanics That Drive Gamification



Badges & Recognition

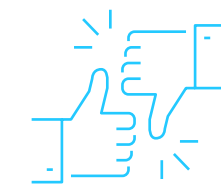
Humans generally crave outward recognition, and gamification can create a digital system for acknowledging successes. Employees who have completed a challenge are rewarded with a symbol of their achievements, like a badge. Those badges allow them to review their accomplishments, set goals for specific levels and support each other in their work.

Example: Home Depot is known for its informed and helpful service, and part of that service is driven by a recognition system. Employees display their expertise on their iconic orange aprons, with badges that indicate their credentials in a specific department or skill. Co-workers and customers can see who has a specific certification and reach out for help or advice accordingly. Employees have a visible record of the trainings they've completed and skills they've added, which can help accelerate careers and growth within the company.

Driving employee engagement by applying game mechanics in the workplace

Google gamification, and you'll unearth theoretical treatises and complicated case studies in abundance. But **gamification** doesn't have to be a challenge—in fact, it can be broken down into 10 basic principles, or game mechanics.⁴¹

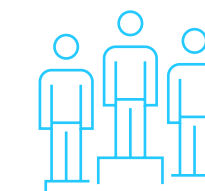
The right combination of these mechanics can push service and sales organizations to new heights. Keep reading for examples of gamification in real-world settings and virtual environments that can be easily adapted to your business.



Fast Feedback

At its core, fast feedback connects behavior to results, quickly. Is an employee performing better today than yesterday? How does she compare to co-workers? What did the last five customers say about her interactions today—not last week? When employees receive fast feedback, accountability replaces guesswork. Frequent updates increase engagement and allow participants to track their progress in small bites and self-correct as needed.

Example: Arbonne, a Swiss personal care and wellness products company, optimizes performance in its call centers through a system of ongoing feedback.⁴² Agents and their managers can immediately see their post-call quality evaluations. By displaying this data, the system enables self-management and proactive performance monitoring.



Friendly Competition

A healthy dose of competition can provide a big push. When a colleague earns a distinction or moves up the leaderboard, others want to prove their mettle. Competition, however, needs to be handled with care. Pairing team and individual competitions that are woven into day-to-day work helps create a positive atmosphere. Highly interactive gamified competition, in which users have real-time access to current scores and standings, pushes workers to excel.

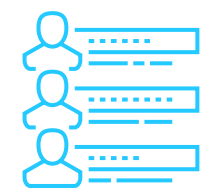
Example: The Nike+ app has received numerous accolades for its use of social media in gamification. Users can share their running stats online to earn bragging rights and challenge their friends. This competition drives users to push themselves ever farther—while sharing Nike's name in the process.

“Pairing team and individual competitions that are woven into day-to-day work helps create a positive atmosphere.”

⁴¹ Adam Aftergut, “Getting Gamification Right”, NICE, www.nice.com/engage/blog/Getting-Gamification-Right-2196

⁴² “Arbonne Case Study”, NICE, <http://www.nice.com/optimizing-customer-engagements/Lists/Customersuccesses/Attachments/10/nice-arbonne-casestudy-final.pdf>





Leaderboards & Transparency

Many companies benefit from a gamified twist on the old-fashioned leaderboard. The system is transparent, and each employee knows exactly where he stands relative to goals and to teammates. This digitized version is flexible, constantly updating and complete. With a digital leaderboard, even an agent who ranks near the middle or the bottom on a KPI has total visibility into his or her relative performance.

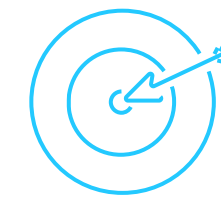
Example: The American Airlines and US Airways merger, which brought significant changes to the contact center organizations of both carriers, offers a glimpse into transparency in action. A new performance management solution simplified the process by increasing users' access to data.⁴³ Agents can now see where they rank numerically among teams and other peer groups. In addition to earning company-wide bragging rights, tighter connections between the performance management system and revenue incentives help agents ensure that their targets and goals are being tracked correctly.



Storytelling & Engagement

Storytelling can create new insights that break down the traditional rigidity of business. Powerful stories entertain and engage while informing and can incentivize action and align employees around organizational priorities and goals.

Example: Like most businesses, Allstate Insurance Company strives to maintain internal and legal standards. However, rather than using tiring seminars or booklets, Allstate's staff learns about compliance through **a game** with superheroes, villains and videos.⁴⁴ It teaches them everything they need to know about corporate expectations and standards and then quizzes them to measure comprehension and "level up."



Going for Goals

Goal-setting is one of the most effective ways to drive improvement and progress.⁴⁵ It clarifies expectations, drives engagement and increases confidence, offering benefits for individuals and groups alike. Using a data-driven approach in the workplace can challenge employees to work towards incredibly specific key performance indicators.

Example: Fitness trackers like Fitbit allow users to follow progress and set regular goals for activity. The devices drive accountability, empower users with knowledge and incorporate social elements. At the end of a workout (or a day or week), users can see how their progress stacks up against their fitness goals.



"Level up" for Achievement

Levels can be used to encourage exploration in new areas and reward employees for expanding or refining skills and/or adding to their knowledge. Some companies are even tying gamification levels to career paths. They define the specific levels that must be achieved to indicate readiness to advance to a new role or department. Employees can then seek out and complete those levels to demonstrate their interest and aptitude.

Example: Google's Local Guides resource uses this game mechanic as an incentive for users to provide details on everything from the availability of parking at the grocery store to the atmosphere of a restaurant. Collecting that data has been crowdsourced through gamification: Android and Google+ users **level up** as they earn points for submitting photos and answering questions about a location.⁴⁶ With each new level comes new options, resources and rewards.



"In addition to earning company-wide bragging rights, tighter connections between the performance management system and revenue, incentives help agents ensure that their targets and goals are being tracked correctly."

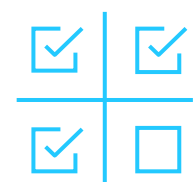
⁴³ "American Airlines Case Study", NICE, http://www.nice.com/optimizing-customer-engagements/Lists/CustomerSuccesses/Attachments/99/American_Airlines_case study-new.pdf

⁴⁴ Kate Everson, "Allstate Is in Gamification's Hands", Chief Learning Officer, [http://cedma-europe.org/newsletter/articles/Clomedia/Allstate is in Gamifications Hands \(Jul 14\).pdf](http://cedma-europe.org/newsletter/articles/Clomedia/Allstate is in Gamifications Hands (Jul 14).pdf)

⁴⁵ Adam Aftergut, "Better Performance Management with the Right Goals", NICE, <http://www.nice.com/engage/blog/Better-Performance-Management-with-the-Right-Goals-2162>

⁴⁶ "Points, levels, and badging", Google Support, <https://support.google.com/local-guides/answer/6225851?hl=en>

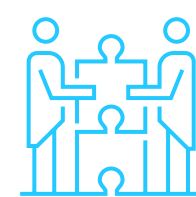




Pointsification

Almost every game has some type of point system, and it is human nature to want to grow the balance. Unlike old-fashioned systems though, gamified points are digital and lasting. A quick tally can help employees and managers identify consistent performance, evaluate their standing at any given moment and recognize what's needed to earn more points. Rewarding positive behavior with points—which can be redeemed for prizes or privileges—is the oldest tactic in the book, and gamification makes it even more powerful.

Example: The Starbucks Gold Card is a renowned status marker amongst the caffeine junkies of the world. Starbucks gamified rewards years ago by creating a social hierarchy based on levels of spending. Members earn “Stars” with every dollar they spend and can eventually achieve Gold status. Those customers receive a Starbucks Gold Card with their name on it and get access to exclusive perks like free drinks.



Collaboration

Games aren't only about competition. They can also be used to inspire collaboration. Gamification in the workplace creates opportunities for co-workers to help one another succeed—when collaboration is a central tenet of a gamification program, employees can more easily find the insight or answers they seek.

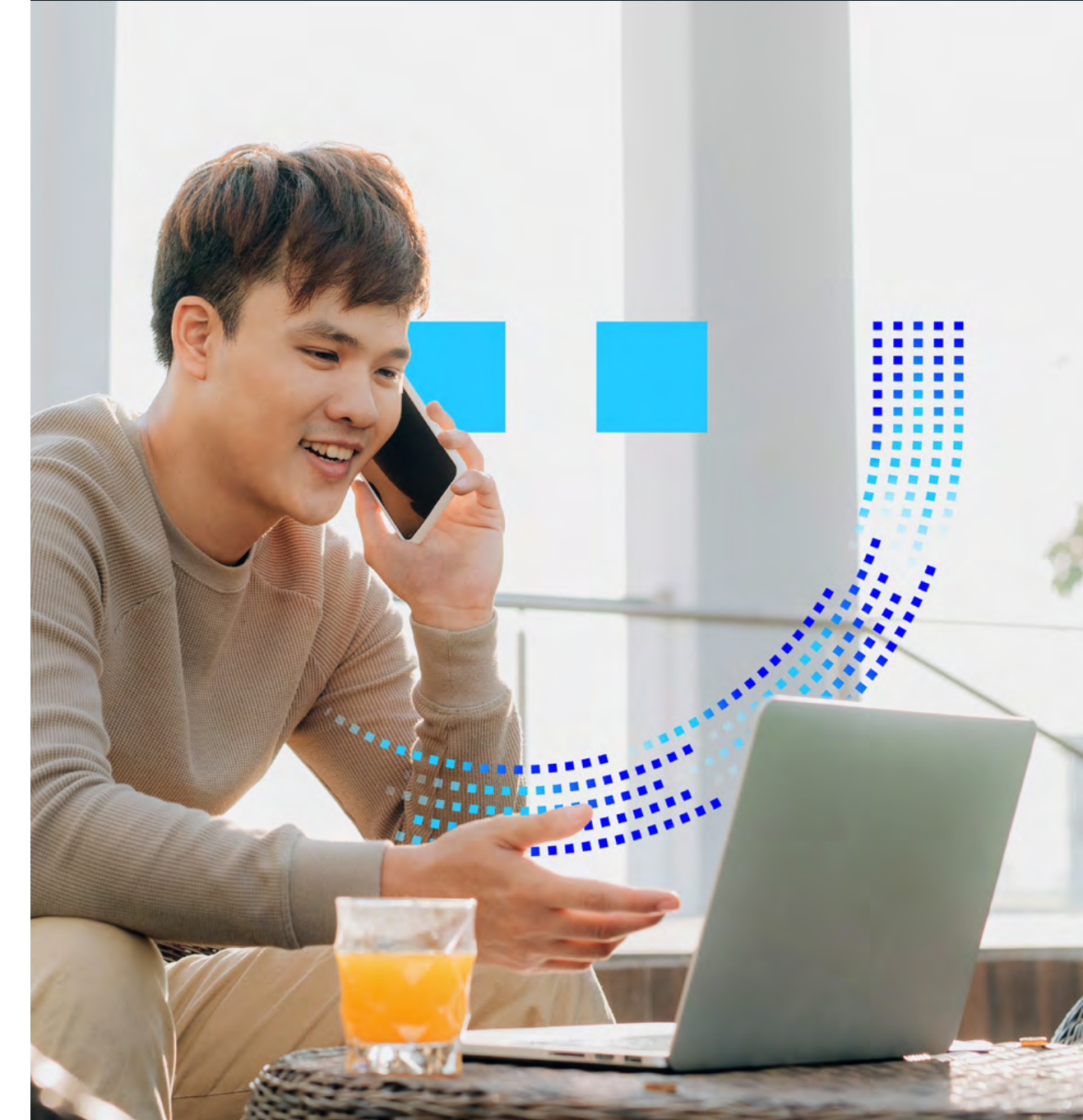
Example: T-Mobile incorporates gamification to encourage employees to participate in a knowledgebase. Users earn points for using the system correctly and awards for contributing their own knowledge. The interactive platform drives both competition and collaboration between team members.



Community

Creating a community component of gamification can increase engagement as people drive, reinforce and challenge one another. If one user shares his experience with a new challenge, suddenly a handful of people explain how they handled the situation. Employees are more committed and engaged when they feel like they're all in it together.

Example: SAP has invigorated thousands of experts through gamification. The company has more than 100,000 expert users registered for its online community, where customers search for information and ask questions. The more answers and ideas an expert contributes, the more points he or she accumulates. Those points translate into tiers—silver, gold, platinum, etc. That's currency these experts can use; it's prestigious and marketable to be a platinum community member.



Organizations that borrow from these 10 core game mechanics can engage employees and improve performance—up to a 25-percent increase in productivity, a 90-percent reduction in training time and a 70-percent reduction in the cost to onboard a new hire. When tied to relevant KPIs and employee goals, gamification helps companies incent the behaviors that drive powerful improvements, all while making work increasingly fun.

“Employees are more committed and engaged when they feel like they're all in it together.”



Pursuing Continuous Performance Improvement

Before there was omnichannel, there were landlines. Ever since Home Shopping Network's earliest ancestor took to the AM radio waves in Clearwater, Fla., phones have been at the core of its business model. The business outgrew a standard rotary phone system mere months after its launch, and it has since then invested consistently in premier hardware and software to empower its teams.

The company was an early adopter of an Interactive Voice Response system for order entry, and it has more recently seen major benefits from implementing performance management at the individual level.⁴⁷

This new performance management initiative has personalized key stages of the employee lifecycle, amplifying employee strengths, embracing transparency and individualizing coaching. This kind of personalized workforce optimization boosts employee satisfaction, reduces turnover and improves performance on key performance metrics, including those reflecting **customer satisfaction**. HSN's ability to offer a positive phone experience remains a vital part of its operations today.

The employee engagement dilemma

HSN is not the only organization constantly seeking out new ways to optimize employee achievement and engagement. The modern workforce is volatile and transient, and sales and service organizations are increasingly challenged by agent turnover and the associated costs, such as hiring and onboarding. On average, 35 percent of contact center staff quit every year, and losing and replacing an agent can cost a business as much as \$20,000.

Contact center supervisors, like managers at most organizations, are **under pressure to keep their employees engaged and satisfied**.⁴⁸ HSN is one of a growing number of industry leaders that have discovered that personalized, analytics-based workforce optimization can help keep their teams engaged and on task.

⁴⁷ "Home Shopping Network Case Study," NICE
http://www.nice.com/optimizing-customer-engagements/Lists/CustomerSuccesses/Attachments/118/NPM_Case_Study_Gamification_HSN.pdf

⁴⁸ Teresa J Tschida, "Creating an Employee-Centric Call Center," Gallup (2005),
<http://www.gallup.com/businessjournal/19087/creating-employee-centric-call-center.aspx>



A new age of employee performance management

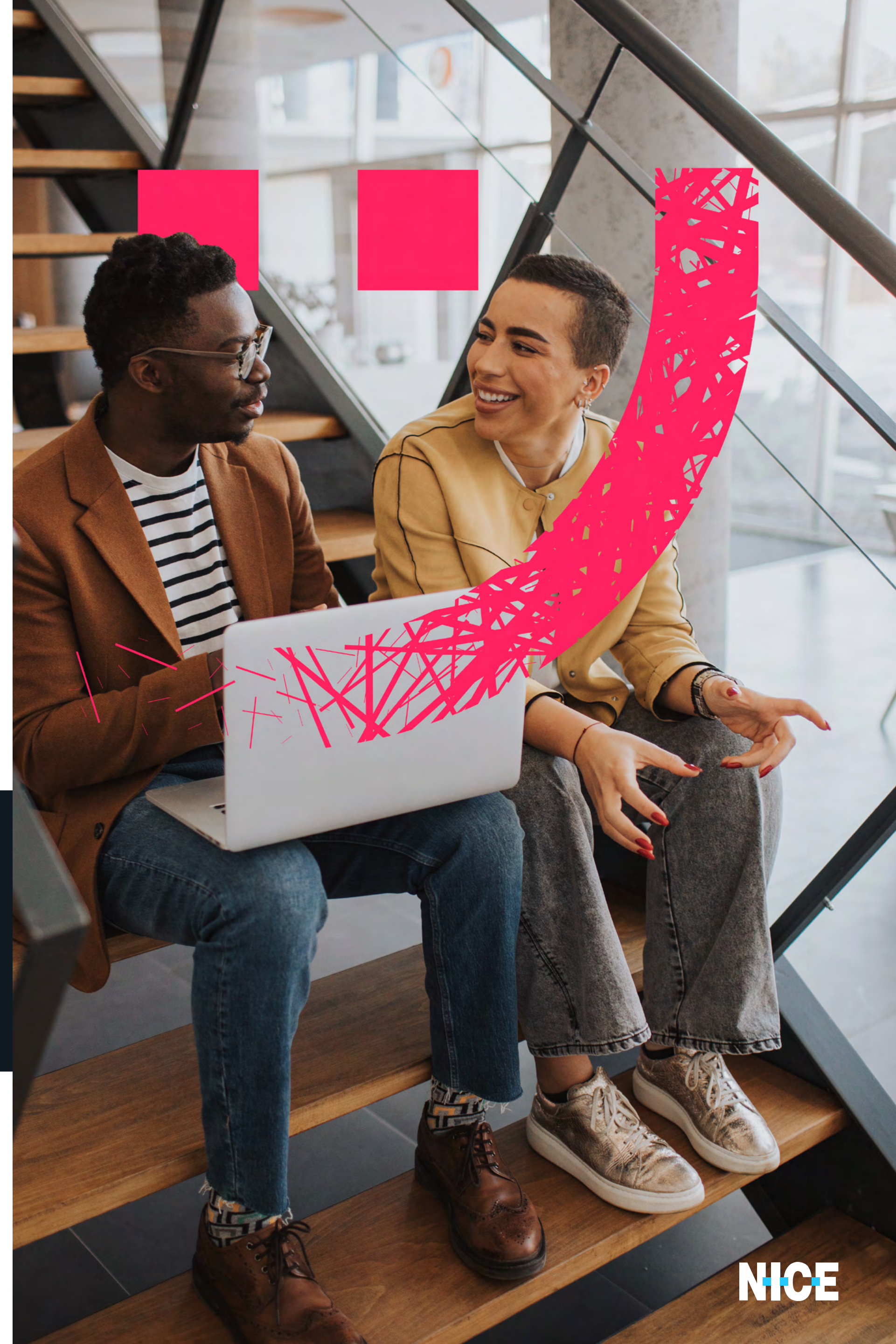
Personalized **performance management** deepens the impact of performance management by taking advantage of the latest tools and techniques in employee engagement, creating a much more empowering experience for the agent.⁴⁹ The model puts employees at the center, so their work environment is fitted to their **personalities**, needs and personal goals, from their individual balanced scorecards to personal achievement rewards.⁵⁰

Supervisor insights into performance trends, history and skills can enhance nearly all areas of performance management and provide direction for things like coaching, goal-setting and gamification. The flexibility of this system is the key to its ongoing success. Personalized performance management is about more than a single competition or skill set—it aligns many behaviors with the company's goals over time.

“Personalized performance management is about more than a single competition or skill set—it aligns many behaviors with the company's goals over time.”

⁴⁹ Adam Aftergut, “Performance Reviews vs. Performance Management,” NICE (2016), <http://www.nice.com/engage/blog/Performance-Reviews-vs-Performance-Management-2171>

⁵⁰ Steve W. Martin, “Seven Personality Traits of Top Salespeople,” Harvard Business Review (2011), <https://hbr.org/2011/06/the-seven-personality-traits-o>



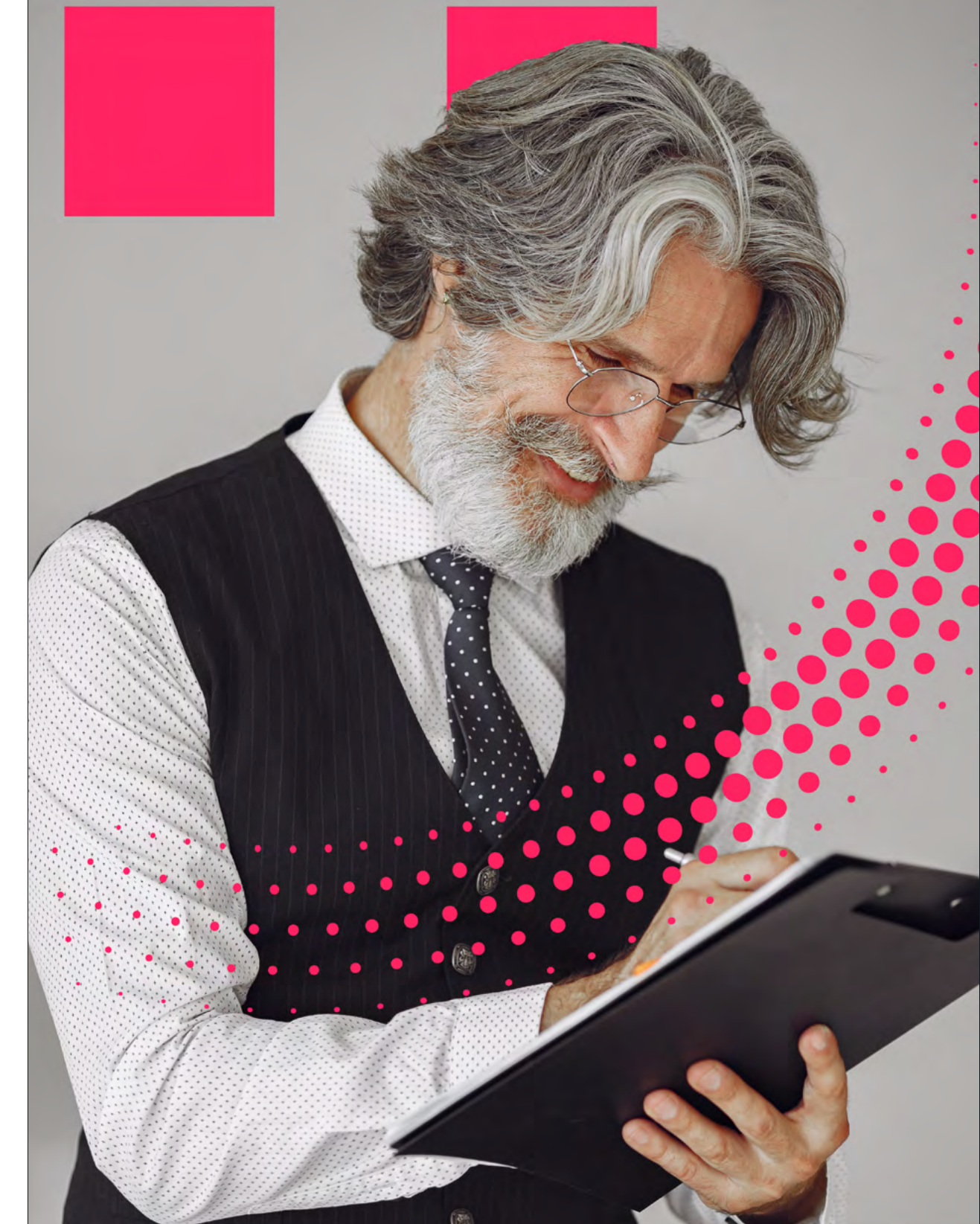
A personalized system of engagement

For example, one of the major performance improvement measures that HSN introduced was a gamification system. Through transparent goals, real-time performance insights and regular feedback, gamification gives HSN a more lively connection with agents. In order to streamline the onboarding process for new employees, HSN introduces the gamification concept with easily-attained goals, such as a first upsell, before introducing more challenging targets.

Not only has the organization completely redefined its coaching culture, but it has also built a community in which senior leadership checks in with top agents to personally recognize their contributions. “Gamification has legs, and I know this program will be going strong in five years,” explained one manager. It’s a complete, coherent and cooperative system.

This success is all the more impressive because many of HSN’s agents work remotely. Remote, at-home work environments typically limit interaction between supervisors and coworkers. The network’s gamification system delivers engagement by creating easy and entertaining channels for the entire “floor” to communicate and compete. It encourages agents to differentiate themselves from their peers and requires managers to build a coaching relationship and stay up to date on each employee’s performance.

Personalized performance management is increasingly a major focus of performance management initiatives in the contact center. Managers can now operationalize analytics at the individual level and ride beyond the simple collection and processing of information. When this capacity is merged with technology and new developments in training, coaching, gamification and continuous employee development, it creates a complete employee experience that is uniquely responsive to their individual needs. And the more pervasive employee engagement is in an agent’s day-to-day experience, the more powerful the performance management outcomes can be.



“Gamification has legs, and I know this program will be going strong in five years”



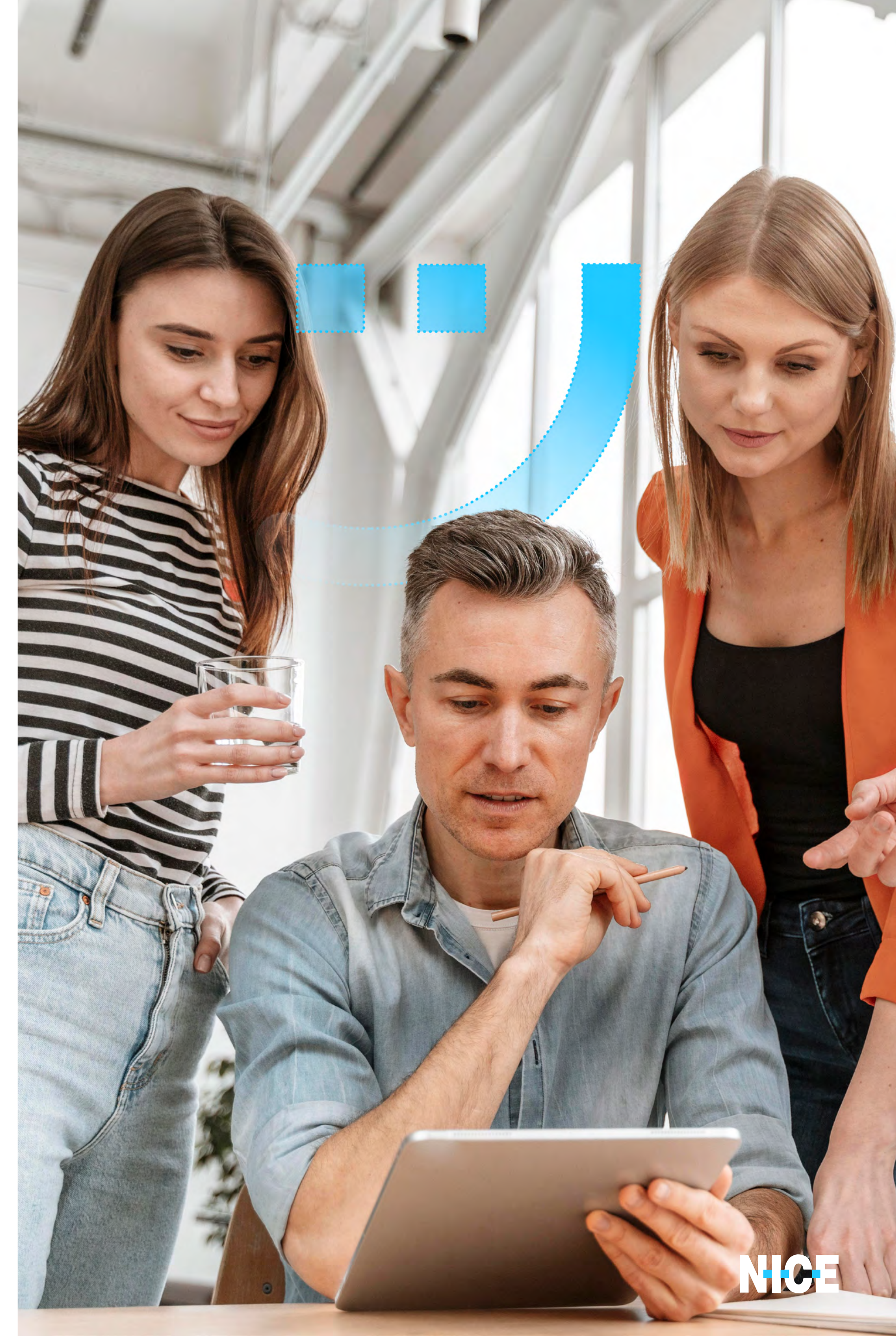
Conclusion

The best practices we have outlined here will allow you to reshape your contact center—to replace outdated performance metrics, segment your employees into productive tiers, develop and apply SMART goals, coach like a pro, implement gamification, and optimize employee engagement with personalized solutions.

This isn't the end of the performance management story though. Every day, we continue to learn more about the potential of performance management. Changing demographics, developments in social psychology and the acceleration of technology mean that new strategies and opportunities are constantly coming to light.

If you'd like to learn more about performance management or any of the other topics we've reviewed, take a look at our list of resources for further reading. We've compiled thought leadership from the Harvard Business Review, Fast Company and other industry publications. These include links to more specialized information so you can further fine-tune your team's performance and meet your organizational objectives. NICE's blogs, ebook collections and webinars also continue to provide user-friendly insight on industry trends.

**You have the knowledge and the power.
It's time to get to work.**



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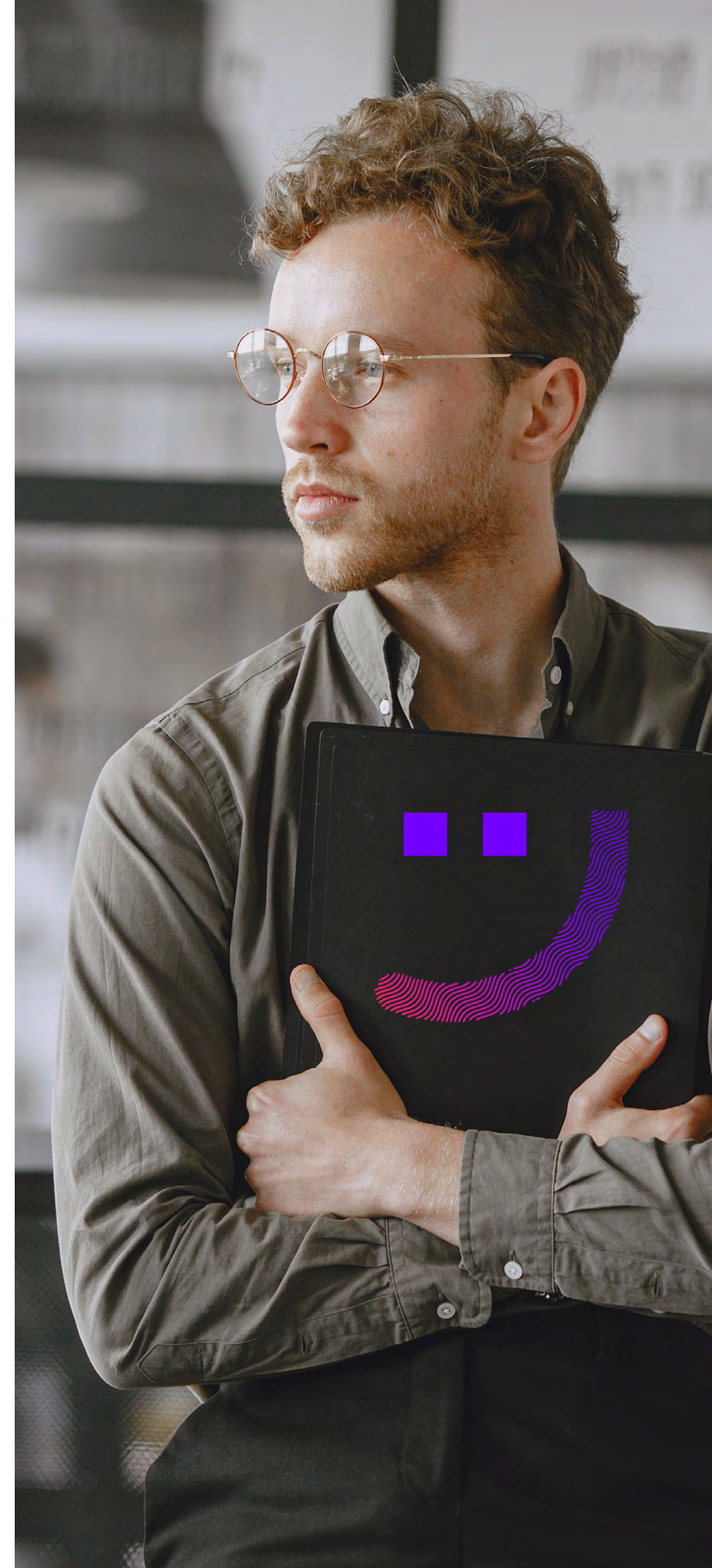
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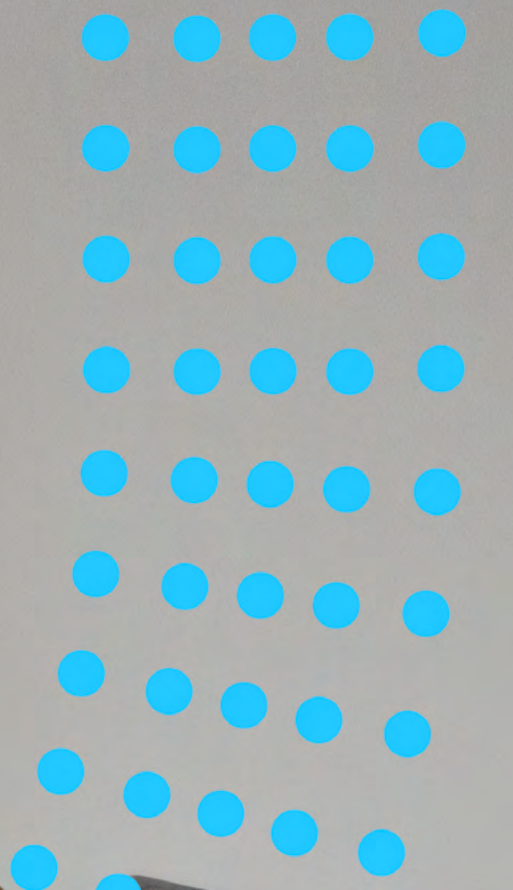
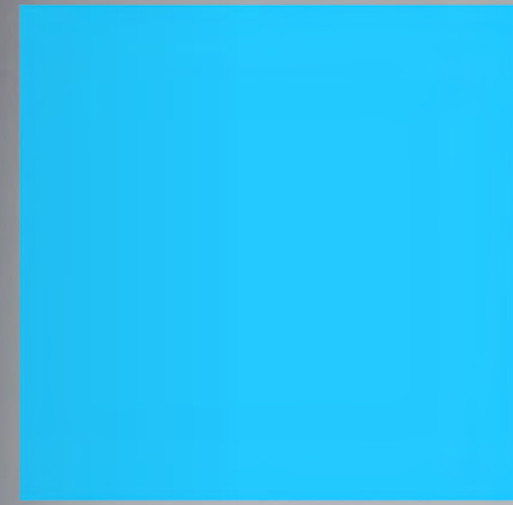
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The NICE Guide to Performance Management in the Contact Center



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