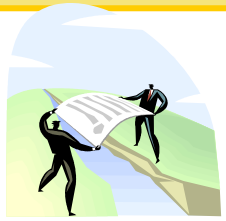
Welcome



Blueprint for Success:

Developing a Call Center Personnel Development Plan

Presented by:

THE CALL CeNTER SCHOOL

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Today's Workshop Leaders

Penny Reynolds and Maggie Klenke are Founding Partners of *The Call Center School* – a Nashville, TN based company that specializes in professional development of call center professionals.

The Call Center School programs cover a wide range of topics including workforce management, recruiting/hiring/training, call center mathematics, traffic engineering, performance measurement and management, call center technologies, and fundamentals of call center supervision.

Penny and Maggie are popular speakers at industry conferences and association meetings and they write frequently for industry publications with articles appearing regularly in *Call Center Magazine, Customer Interaction Solutions, Contact Professional, Customer Interface, ICCM Weekly*, and others. They have authored the five textbooks used by the University of Phoenix call center management program, as well as the popular *Call Center Staffing – The Complete, Practical Guide to Workforce Management*, *Business School Essentials for Call Center Leaders*, and *Call Center Supervision – The Complete, Practical Guide to Managing Frontline Staff* and *The Power of One.*

Between them, they have over fifty years combined experience in the area of call center operations, consulting, and teaching. They were the first in the industry to earn CIAC professional certification as Certified Call Center Management Consultants.

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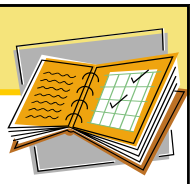
Session Overview



In this session, you will learn to:

- Outline the components of an overall call center personnel development plan.
- Define the essential ingredients of new-hire orientation.
- Describe considerations for ongoing call center training and evaluation.
- Define recommended training for a variety of call center positions.

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Why Do a Needs Assessment?

A needs assessment will help you understand if training is the right approach, and if it is, to ensure you provide the right training.

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Training Needs Analysis

Performing a training requirements analysis helps to define the gap between:

"What You Have" and "What You Want"

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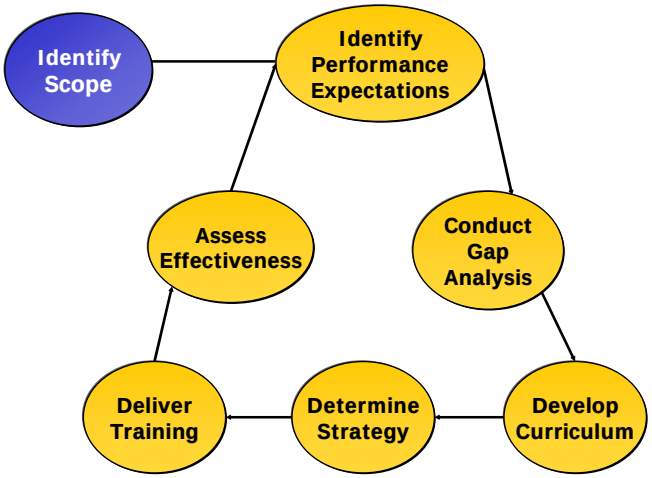
Step One: Identify Scope



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Identifying Scope

New Employee Orientation

- To the organization/culture
- To the call center
- To the team
- To the industry

Ongoing Training

- Skills necessary to perform the job
- Skills necessary to enhance performance

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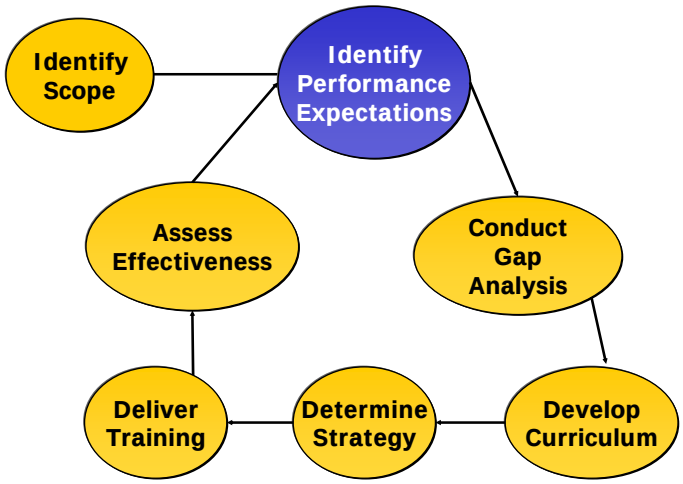
Step Two: Identify Performance Expectations



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Identifying Performance Expectations

Agent Expectations

- Use customer's name and company name.
- Use proper hold and transfer technique.
- Utilize proper words and phrases.
- Resolve problems in one call.
- Perform necessary wrap-up work in conjunction with call.
- Accomplish "x" percent of sales conversions.
- Adhere to published work schedule.

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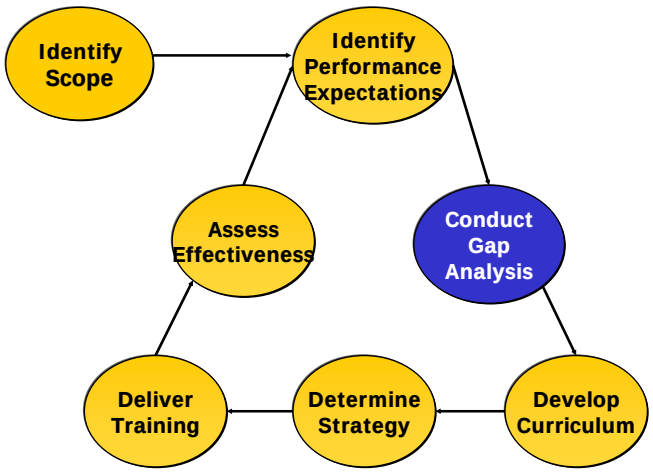
Step Three: Conduct Gap Analysis



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Gap Analysis

The Gap:

- Current proficiency vs. mastery
- What you have vs. what you want
- Supervisors determine via observation:
  - Automated or live monitoring
  - Side-by-side observation
  - Performance reports
  - Review of written correspondence

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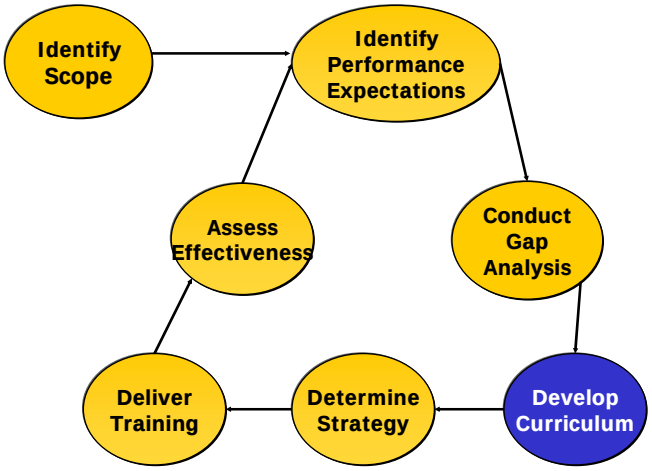
Step Four: Develop Curriculum



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Curriculum Development

- Develop statement of purpose.
- Identify required skills and competencies.
  - Agent must know…
  - Agent must be able to…
- Identify course topics and subtopics.
- Develop course objectives.
- Develop a course outline.
- Develop a course schedule/syllabus.
- Develop testing and success criteria.

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Characteristics of a Well-Stated Objective

- **Performance**

  What a learner is expected to be able to do

- **Conditions**

  Conditions under which performance will occur

- **Criterion**

  How well the learner must perform in order to be considered acceptable.

Bloom's Taxonomy of Educational Objectives in the Cognitive Domain

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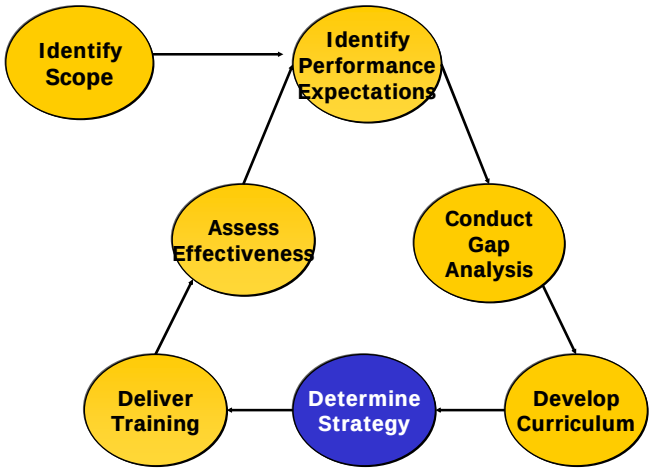
Step Five: Determine Strategy



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Adult Learning Model

- **Tell** them.
- **Show** them.
- Let them **try.**
- **Monitor** and provide **feedback.**
- Let them **try again.**
- **Reinforce.**

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Learning Styles

- We learn through a combination of styles, but each learner will gravitate toward one style.
- Instructors tend to teach the style of their "personal" preference.
- Mixing formats and styles helps to assure greater learning.
- Learning styles:
  - Visual
  - Cognitive
  - Kinesthetic

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Benefits of Blended Training

- Skills are interwoven and practiced in ways to reinforce each other.
- Skills simulate the real working environment.
- Agents become more proficient at their jobs in less time because they learn how to combine the skills in training.
- Trainees hit the floor at a high level of proficiency.
- Agent confidence is increased.

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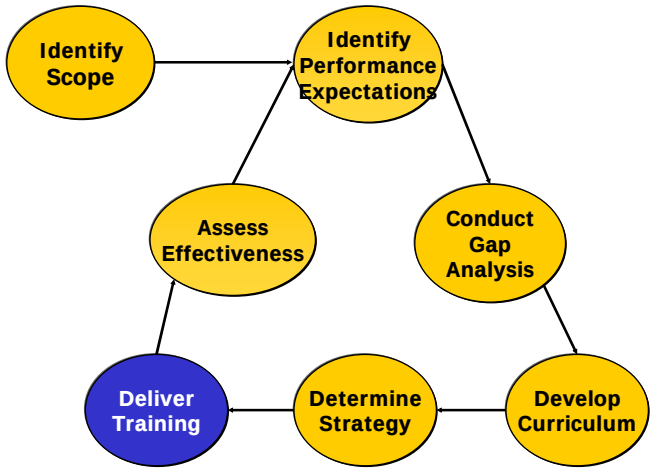
Step Six: Deliver Training



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Training Formats

- Classroom training
- On-the-job training (OJT)
- Computer-based training (CBT)
- Web-based training (WBT)
- Self-paced training (reading, CDs, DVDs)
- Simulations
- Side-by-side coaching
- Peer mentoring
- Role plays
- Team meetings
- Brown bag lunches

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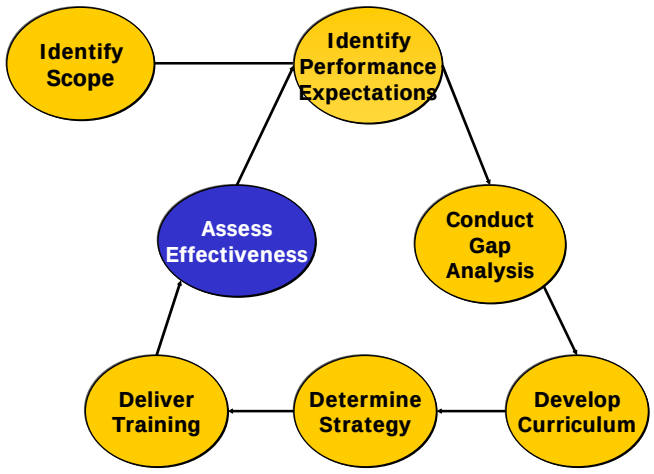
Step Seven: Assess Effectiveness



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Four-Level Evaluation of Training

The Kirkpatrick Model

Level 1: Reaction and Evaluation

Level 2: Knowledge Assessment

Level 3: Job Performance

Level 4: Business Results

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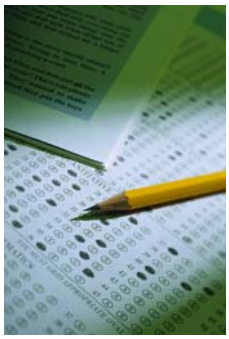
Assessment Phases

Five Measurement Points:

- Before training
- During training
- After training
- In the workplace
- Upon exiting the workplace



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Session Overview

In this session, you will learn to:

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Orientation Program

Objectives:

- Make the agent feel welcome.
- Create a positive impression of your company or department.
- Engage the agent from the start.
- Communicate organizational procedures.
- Begin integration into the call center team.
- Expedite agent readiness.

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Pre-Orientation

Before the first day . . .

- Send materials to the new agents.
- Prepare their work area.
- Send announcement to call center staff with new agents' names and work groups.
- Plan how to welcome them.
  - Coordinate HR and call center orientation program.
  - Assemble written material.
  - Review/modify new agent FAQ document.
  - Assign a "buddy" and plan lunch.

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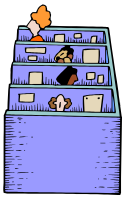
Supervisor's Responsibilities

- Prepare the agent's work area.
- Ensure IT/Telecom access activated.
- Send materials to new agent; greet on first day.
- Conduct tour of call center and introduce agent to staff.
- Introduce agent to co-workers.
- Review organization chart.
- Provide explanation of where and how to get support.
- Review job description and work schedule (hours/days, breaks,lunch, overtime).
- Discuss attendance policy and performance form.
- Identify products/services to be supported.
- Discuss job assignments and training plans.



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Manager's Responsibilities

- Coordinate with the HR Department to ensure smooth scheduling for department orientation activities.
- Greet each new agent and check in on them frequently during first week training.
- Check how the first day went and answer any end-of-day questions.
- Periodically monitor and adjust the orientation and training plan.

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Buddy's Responsibilities

- Act as information source for policies, procedures, work rules.
- Help clarify assignments.
- Provide introductions and include agent in social activities.
- Assist with training.
- Acts as a tour guide and lunch companion.
- Provide feedback and encouragement.
- Identify resources.
- Help sort out priorities (temporarily).

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Welcome Package

- Welcome letter from the call center manager
- Organizational chart
- Map of the facility and location of call center
- Terms and acronyms unique to the industry
- Call center department and team metrics
- Individual performance metrics and evaluation form
- Sources of information
- Job description
- Schedule (confirm 1st day details)
- Contact information for "buddy"
- Day one – survival agenda
- 2-week, 30-, 60-, and 90-day checklists

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Frontline Curriculum

Company Specific:

- Telephone functionality
- Computer system navigation
- Product/service knowledge
- Competitive analysis
- Account management

General:

- Call center basics/terminology
- Telephone skills
  - Telephone etiquette
  - Word choices
  - Handling difficult calls
- Vocal techniques
- Specialized skills:
  - Email
  - Sales
  - Collections
  - Research

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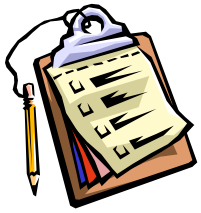
Other Components

- About the organization
- Compensation
- Benefits
- Attendance
- Security
- Workplace/ergonomics
- Communications



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30-, 60-, and 90-Day Checklists

Critical Questions:

- What additional things does the agent need to know?
- What policies and procedures could affect job performance?
- What behaviors do you want to reinforce?
- What specific tasks can you assign to allow for growth?
- Do you need to broaden delegation of authority or empowerment?
- What feedback should you give on the agent's performance?
- What training objectives need to be met?

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What Happens Next?

- Three to Six Months – Reality
  - Agent has discovered how things really work.
  - Agent has a clear grasp on "this is my job".
- Six to Nine Months – Open Exchange
  - Agent has gained skills and can work productively most of the time.
  - Agent begins to offer suggestions.
- Nine to Twelve Months – Productivity
  - Agent has been trained to be a productive team member.
  - Peers and supervisors expect full participation from the agent.
  - Employee is rarely referred to as a "new agent."

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How Do You Measure Results?

- Agent and supervisor evaluations
- Pre- and post-testing
- Standardized course evaluations
- Comparison of retention versus turnover statistics
- Audit of performance reviews
- Employee focus groups
- Other?

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Career Growth – What's at Risk?

Career Roadblocks cause:

- Increased agent turnover
- No incentive for agents to develop skills for improving their performance
- Lack of a foundation for continuously improving your organization
- Decreased job satisfaction
- No opportunities for succession planning and leadership development

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Current Career Path

Audience Question

What percentage of your supervisors "came up through the ranks" from frontline agent positions?

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Fitting the Role

Do your best agents make the best supervisors?

Maybe....or Maybe Not!

Some of the best agents have a high need for individual achievement and won't enjoy or be effective at supervising people.

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Attributes of Top Supervisors

- People oriented
- Results oriented
- Desire to manage
- Honest
- Trustworthy
- Consistent
- High level of energy
- Positive attitude
- Willing to disagree
- Good communicator
- Sound judgment
- Good interpersonal skills
- Handles pressure
- Plans and organizes well
- Manages time effectively
- Flexible
- Enjoys seeing others succeed
- Open to learning

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Call Center Supervision

Audience Participation

What types of knowledge/skills are needed for supervising staff in a call center environment?

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Supervisory Curriculum

Four Components:

- Customer Service Expertise
- Management and Leadership
- General Coaching
- Call Center Specifics

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Customer Service Skills

- Maximizing Customer Relationships
- Understanding Customer Value
- Telephone Best Practices
- Email Best Practices

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Management and Leadership Essentials

- Organizational structure
- Project planning and management
- Budgets and finance
- Problem solving
- Team performance management
- Time management
- Progressive discipline
- Documentation
- Diversity
- Legal issues in the workplace
- Effective communications (including e-mail)

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Coaching Essentials

- Monitoring and Calibration
- Setting Performance Goals
- Coaching and Motivation
- Performance Counseling
- Performance Appraisals

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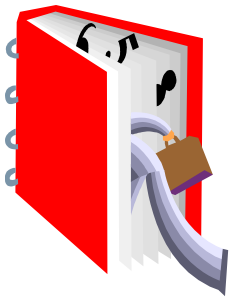
Supervisory Curriculum



Call Center Specifics:

- Hiring and retaining staff
- Performance management
- Staffing and scheduling
- Key performance indicators
- Call center technologies

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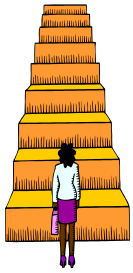
Other Career Path Options

Traditional Route:

- Lead agent
- Team leader
- Team supervisor/manager



Other Options:

- Trainer
- Quality specialist
- Workforce planner/ scheduler
- Technology specialist

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Curriculum for Trainers

Components:

- Training needs assessment
- Instructional design
- Adult learning concepts
- Program development
- Presentation skills
- Assessment/testing

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Curriculum for Quality Specialists

Components:

- Defining performance standards
- Creating a quality form
- Call calibration
- Coaching
- Maximizing monitoring technology

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Curriculum for Workforce Planners/Schedulers

Components:

- Data collection and analysis
- Forecasting workload
- Calculating staff requirements
- Creating staff schedules
- Managing daily service
- Managing adherence and attendance

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Thank You!

Thank you for your participation today.

Good luck with your training
and development plan!

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For More Information

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