



ICMI Tutorials

Recruiting and Hiring Fundamentals

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Creating and Implementing a Recruiting Plan

Key Points

- Recruiting is the process of developing a pool of qualified candidates who are interested in working for your call center.
- There are six fundamental steps in a sound recruitment and selection process:
 1. Analyze job tasks
 2. Identify specific skills and competencies required
 3. Describe the performance required by the job
 4. Develop a job description
 5. Identify source pools and create a recruitment plan
 6. Define and implement the selection process

Explanation

Recruiting is the process of developing a pool of qualified candidates who are interested in working for your call center. Recruiting is a two-way street; just as you are looking for qualified candidates, those individuals are also looking for the right employer. Consequently, the two primary goals of recruiting include:

1. Develop a pool of qualified candidates for the organization
2. Provide realistic job previews to candidates – honest and candid assessments of what kinds of jobs and opportunities are potentially available

As with many other aspects of call center management, recruiting is most effective when it is driven by a practical, proven process. The following process is drawn from “How to Develop a Retention-Oriented Agent Recruiting and Selection Process” by Anita O’Hara, published in *Call Center Management Review*.

A Six-Step Recruiting and Selection Process

1. **Analyze job tasks:** Begin by taking a detailed look at your top-performing agents. Consider both the efficiency and effectiveness with which they perform their tasks. It may also be useful to re-review your star agents’ resumes. Also, take the time to observe and conduct follow-up interviews with a group of “experts” performing their jobs. Try to identify common tasks they perform well.
2. **Identify specific skills and competencies required:** Use this analysis to create a list of skills that are critical, such as communication and articulation, analytical skills, organizational skills, call center or customer service experience, listening skills and

computer skills. If you are creating a customer service organization from the ground up and have no stars from whom to create a standard, try benchmarking with a similar type of company. Generally, you'll find that, regardless of industry, call center managers are looking for agents with similar skills.

3. Describe the performance required by the job: Next, consider which competencies or behaviors you want your prospective employees to demonstrate. A few common competencies include: positive attitude, flexibility, teamwork and cooperation, customer orientation, self-reliance and stamina. There are a variety of companies that can help you to identify these and which can even create a hiring instrument that will improve your retention rates.

4. Develop a job description: Once you know what type of agent you're looking for, you can identify the type of performance required and write your job description. At this stage, you're prioritizing your desired and required skills and competencies, describing the work environment in which employees will coexist, identifying the scope and breadth of the job (e.g., what kinds of decisions will prospective agents make).

In addition, this is the point at which you should identify the agents' pay structure. It's best to include two key groups in this process – HR and senior leadership. Human resources can help to assess compensation in the external market. They can also help to price your jobs comparable to other jobs within the organization. The senior leadership team can help you to identify your pay strategy. That is, do you want to be the employer of choice or simply pay the market average?

5. Identify source pools and a recruitment plan: Every staff selection strategy should include recruitment sources as well as a selection plan. It's important to track your sources and analyze their success over time. For each candidate hired, be sure to track and record the following: 1) source; 2) performance; 3) attendance record; and 4) tenure.

In this manner, you can determine the success of each source. If one source yields consistently high-performing agents who stay, keep using it. If, on the other hand, a source results in an agent pool that regularly turns over, it's time to stop recruiting through that source. (See Sources and Methods for Recruiting.)

6. Define and implement your selection process: The most common pitfall managers make during the final selection is to put too much weight on a single facet of the screening/interview process. For instance, a candidate may be terrified by the job interview, yet have an excellent background, great references, score well on the behavioral screen, and may have presented himself in an excellent fashion during the phone screen. Consider all parts of the process, as well as the weight you will attach to each, before making your final selection. (See Conducting Effective Interviews.)

Excerpts from "How to Develop a Retention-Oriented Agent Recruiting and Selection Process" by Anita O'Hara, *Call Center Management Review*, April 2001.

Determining the Required Number of New-Hires

Part of any effective recruiting strategy is an accurate forecast of the number of new-hires required and when they will need to be hired. This forecast should be based on the expected turnover rate and growth rate (positive or negative) of required full-time equivalents (FTEs).

The following considerations should also be a part of determining the new-hire requirements:

- Seasonality of turnover
- Scheduling considerations (e.g., number of part-timers for flexibility, shift requirements or the use of temporary staff)
- Length of new-hire training
- Percentage of new-hires that do not successfully complete new-hire training

For example, Call Center A currently has 100 agents with a past turnover rate of 15% for the month of April. The call center will begin to support two new product lines in June and, based on the increased workload, expects a need of 20 additional full-time equivalents (FTEs) based on a 40 hour work week. Since the new-hire training period lasts 6 weeks, these new employees need to be hired in April. Past experience has shown that scheduling is most effective if about 10% of the FTE requirement is made up of agents who work 20 hours each.

This scenario would result in the need of a total of 37 new-hires – 15 agents because of attrition, and 18 full-time agents (40 hours per week) and 4 part-time agents (20 hours per week) because of the new product lines.

The timeframe for setting goals for number of new-hires should be calculated on a monthly, quarterly or yearly basis depending on the size of the call center and seasonal considerations.

Site Selection Considerations

The ability to recruit the required workforce is heavily influenced by the location of the call center. If recruiting sources are chronically unable to produce the necessary number of appropriately skilled staff, moving the call center to another location may make sense.

Some site selection considerations that impact recruiting include:

- Labor pool
- Unemployment and underemployment rates
- Population growth (number of new residents versus residents that are leaving)
- Compensation rates for the area
- Educational level of labor pool
- Languages spoken by labor pool (if multiple languages are a requirement)
- The labor pool's perceived prestige of the organization or desirability of the position

(For more information on site selection, see ICMI's *Call Center Operations Management Handbook and Study Guide*.)

Sources and Methods for Recruiting

Key Points

- There are many sources of candidates and many possible methods of recruiting. Organizations with the most successful recruiting programs track and assess the success rates of each method, and correlate the performance of new-hires to recruiting sources.
- Recruiting for diversity may require targeted recruiting campaigns.

Explanation

To support the recruiting process, there are a number of sources you can use to develop a pool of candidates, including:

- **Current employees:** The organization's current employees usually hear about job openings from an internal job posting system.
- **Referrals from current employees:** Generally, new-hires who result from referrals of current employees have greater loyalty, tenure and job satisfaction than those from other recruiting sources. (Key reason: current employees provide the most realistic job preview.)
- **Former employees:** These could be temporaries, those who were laid off, those who quit but wish to return, or contractors.
- **Customers:** Customers are familiar with products and services and often have insights into how you can improve customer service.
- **Competitors:** New-hires from competitors can provide valuable experience to the organization.
- **Schools/local colleges:** Many schools have intern programs that enable interns to gain experience, organizations to benefit from their contribution and the potential for future recruitment and full employment. A growing number of local colleges also have call center or customer service programs.
- **Staff-sharing:** Staff-sharing is when call centers with complementary busy seasons form a staffing alliance to help each center cost-effectively handle the workload. (See Staff-Sharing Arrangements, this section.)
- **Disabled candidates:** Physically disabled candidates represent an excellent and largely untapped pool of candidates for many call centers.
- **Employment agencies:** Many call centers use external resources for

recruitment, especially those specializing in call centers.

Methods of Recruiting

Just as there are many sources of candidates, there are many related methods of recruiting. Examples include:

- Internal job postings; e.g., through an Intranet
- Recommendations by a team leader, supervisor or manager
- The union hall
- The organization's Web site
- Career/job sites on the Internet
- Employment agencies
- Print advertisements; e.g., local and national papers, professional journals, trade magazines, inserts in catalogs and sales flyers
- Job fairs
- Mall handouts

How do you know which method is most effective? What criteria should be used to evaluate the sources and methods? Some factors to consider when determining the most effective methods include:

- Average cost per hire
- Tenure
- Job performance issues:
 - The time it takes for a new-hire to become fully productive
 - The candidate's previous job performance
 - The candidate's current job performance
- Ability to match candidates to position requirements (e.g., willingness to work certain shifts or locations)
- Applicant-to-hire ratio

Organizations with the most successful recruiting programs track and assess the success rates of the methods they use to find job candidates. They correlate the performance of new-hires to recruiting sources, both to improve the recruiting process and to focus training and retention programs.

Using Employment Specialists

Leading staffing companies, including Kelly Services, Manpower, Olsten Staffing and Remedy Intelligent Staffing, offer a wide range of options to meet call center staffing needs. Managers can use one or a combination of the following staffing approaches:

Temporary: Temporary agents may be used to fill staffing gaps during peaks in the call center on a regular basis, or to handle special projects (such as a new product introduction). Seasonal assignments (i.e., handling heavy volume during the holiday season) may have a firm beginning and end. Other more long-term assignments may be open-ended, with temporary workers supplementing a core group of permanent agents on the call center's staff.

Temporary to permanent: This increasingly popular approach has two key benefits: First, the call center can try out a potential employee on the job before making the decision to hire. Second, since the likelihood of turnover is generally highest during an agent's first three or four months on the job, the temp-to-perm approach helps companies minimize their investment in agents who wind up leaving.

Permanent: Sometimes called "direct placement," this is the more traditional approach to staffing, wherein the staffing agency identifies candidates, pre-screens them, then presents them to the call center (or the company's human resources department) for selection. These employees immediately go on the call center's payroll.

In addition, some staffing companies offer on-site management to oversee temporary or contingent agents or to manage the entire operation. But companies that have had call centers for years have recruited and hired their own call center agents. Why are they now willing to pay an employment agency to do the job? In part because staffing is the core competence of employment agencies, thus they can afford to make the investment required in such areas as:

- Research that reveals the behavior, skills and attributes of successful call center agents
- Development of specialized testing instruments that identify candidates most likely to perform well in the call center
- A wide range of recruitment approaches that enable them to assemble a large pool of skilled workers
- Training specifically targeted to the call center environment

Excerpts from "Call Center Managers Turn to Employment Specialists for Staffing Solutions" by Leslie Hansen Harps, *Call Center Management Review*, December 1999.

Recruiting a Diverse Workforce

Recruiting for diversity can be somewhat different than general recruiting. For example, you may need to identify the diverse groups you want to target and develop a recruiting campaign directed toward them. Some of the more prominent sources for recruiting minorities include:

- State employment agencies
- Regional equal employment opportunity offices
- The Small Business Administration

- Community organizations
- City council offices
- County human rights commissions
- State departments of rehabilitation
- Colleges and universities
- Professional, student and alumni associations
- Church organizations

Internal vs. External Hiring

Key Points

- Call center management must carefully examine the potential implications of hiring for open positions from within the organization (internally) or outside (externally).
- This internal or external hiring question is important in making certain the right person fills the job, standard and fair hiring practices are followed and larger call center objectives are filled.
- Generally, organizations prefer to fill the majority of open positions internally because it supports knowledge management and career-pathing principles and has a positive effect on employee morale. Hiring externally, however, can bring new life to the call center in the form of fresh perspectives and new ideas.

Explanation

Call center management must carefully examine the potential implications of hiring for open positions from within (internally) or outside (externally). The decision is usually made on a case-by-case or position-by-position basis although most centers have general rules that guide the hiring process.

The internal or external hiring question is important in making certain the right person fills the job, standard and fair hiring practices are followed, and larger call center objectives are fulfilled. Generally, organizations prefer to fill the majority of open positions internally because it supports knowledge management and career-pathing principles and has a positive affect on employee morale. Hiring externally, however, can bring new life to the call center in the form of fresh perspectives and new ideas.

Your organization may, for instance, hire most agents from the outside. Supervisory and quality positions may normally be filled internally from the ranks of the call center agents, though the call center manager may make exceptions depending on call center conditions and individual position requirements. Positions that support and maintain call center technology may be filled by outside candidates since the required skill sets are typically not present in existing call center staff.

The costs and resource implications of the decision are specific to each situation. For example, it may be more cost-effective to hire an outside

candidate who already possesses required skills, than to train an internal employee. However, if recruiting costs are expected to be high and the process of finding the right person long, training an internal hire could be the better solution.

Advantages and Disadvantages

Some of the advantages of hiring internally include:

- Demonstrates the organization's intent to develop career growth opportunities for employees
- May uncover and leverage employees' hidden knowledge, skills and abilities
- Has a positive effect on employee morale
- Supports knowledge management initiatives by promoting tenure
- Complies with applicable human resource directives to post all positions internally prior to soliciting candidates outside the organization
- May be less expensive to recruit due to reduced advertising costs
- New-hires may be productive more quickly because of familiarity with the organization's processes, network and culture
- New-hires may be able to create alliances between other departments and the call center based on prior relationships

Disadvantages of hiring internally include:

- New-hires' lack of experiences beyond the boundaries of the organization
- May generate resentment of employees who disagree with hiring selection
- Promoted individuals may have difficulty or meet resistance in managing peers
- In some cases, new-hires may require more training for job-specific skills

Advantages of hiring externally include:

- Influx of new ideas and creativity resulting from experiences outside the organization and ability to see the organization and their responsibilities with new eyes
- Depth and breadth of industry exposure may surpass what internal candidates can offer
- New-hires are not bound by standard practices; i.e., current traditions
- By recruiting for the specific skill sets needed, less job-specific training

may be required

- May help the organization create a more diverse workforce

Disadvantages of hiring externally include:

- The new employees' ideas and suggestions may not be readily or immediately accepted by current employees
- Additional time may be required to become familiar with the organization's processes, network and culture
- There may be resentment from current employees who feel the position should have been filled internally
- May send the demotivating message that internal career paths are limited
- External candidates are "unknowns;" it may be difficult to determine if they will fit in with the organization's culture and interaction styles
- May be more expensive if recruiting and screening costs are high

In either case, the leadership of the call center can mitigate many of the downsides associated with new-hires by taking steps to support their assimilation into the organization, call center, team and position, regardless of whether they come from within or outside the organization.

Conducting Effective Interviews

Key Points

- Interviews are essentially conversations between you and prospective job candidates. Interviewing provides you with the information to determine those who should continue in the selection process and identify those who are not an appropriate fit.
- Structured interviews produce better results than unstructured interviews, by diminishing bias and increasing consistency.
- Interviews may be conducted by the HR department, call center manager, supervisor, team leader, peer or any combination.
- Initial interviews by telephone and/or text-chat are recommended for call center positions, since they simulate the job's performance requirements.

Explanation

Interviews are essentially conversations between you and prospective job candidates. Interviewing provides you with the information to determine those who should continue in the selection process and those who are not an appropriate fit. The goal is to identify unsuitable applicants early in the process, to save time and reduce costs for both the organization and applicants.

Screening Tools

There are many variations of screening tools, from simple to involved, low-tech to high-tech. Examples include:

- **The application form:** The application form is a tool to determine if the applicant meets minimum job requirements. You will need to establish an application checklist of the important items for the job and determine the selection criteria based on that checklist.
- **Resumes and cover letters:** These may be used as part of the screening process, in addition to or in place of the application form. Resumes and cover letters may be less revealing than an application because the employer does not stipulate the information included.
- **Tests:** Short tests can assess job aptitude and knowledge. The tests must be based on job analysis and be valid predictors of successful performance. Tests may include:

- **Performance tests:** Assesses the ability to perform a skill, such as data entry
- **Aptitude or cognitive ability tests:** Measures candidate skill level, in areas such as verbal, math and problem-solving aptitude
- **Physical tests:** Tests a person's strength and endurance (rarely used in call center settings)
- **Work samples:** Provides insight into the applicant's quality of work
- **Personality and psychological tests:** Assesses traits or individual characteristics
- **Drug tests:** Designed to identify problem employees or comply with company policies
- **Job-match tests:** Attempts to determine the best job fit among candidates

Note: Some tests have been found by courts to unfairly favor some candidates over others who are equally qualified for the position. This may violate equal rights and discrimination laws. Questionable tests should be reviewed by legal council competent in this area of law. (See Ensuring Legally Sound Employee Selection, pp. 19-20.)

- **Recommendations:** Verbal or written recommendations can provide insight into the applicant's strengths and provide an opportunity to assess the candidate from another perspective.
- **Reference checks:** Dates of employment, positions held and eligibility for rehire is the limit of the information gathered during most standard reference checks. This information is usually supplied by HR departments, which may be limited in the qualitative information they are permitted to disclose.

Interview Structure

The two basic types of interview structures include:

- **Unstructured:** The unstructured interview consists of random questions designed to gain insight into the candidate's suitability for the job. The questions are not documented in a standard interview guide. Instead, they are selected by the interviewer "on the spot." This is a common method for selection, but often has low effectiveness and validity, for a number of reasons:
 - Interviewers may not use the same criteria for assessing candidates

- There is the potential for personal bias on the part of the interviewer since formal job-related competencies are not used as the basis for the interview questions
- Interviewers have a tendency to make assessments too quickly
- The interview experience is inconsistent from interview to interview for the same job regarding questions to ask, format, criteria for selection, description of job qualifications and responsibilities
- Difficult to defend against discrimination claims, since same questions are not applied to every candidate
- **Structured:** The structured interview is based on the job description for the position. Consistent questions are developed based on job responsibilities and competencies, and standard criteria are used for ranking or rating candidates.

Structured interviews usually consist of three types of questions:

- **Behavior-based questions:** These questions explore how individuals behave in certain job-related situations by asking the applicant to describe events in his or her work history. To support this type of interviewing, the interviewer has a list of job-related competencies and questions formulated to uncover these competencies.
- **Content questions:** These questions are designed to assess whether the applicant possesses the knowledge required to do the job, such as specific industry terminology.
- **Questions related to working conditions:** These questions check the applicant's willingness to work under certain conditions (e.g., work schedules, adherence and monitoring).

Interviews

Interviews may be conducted by the HR department, call center manager, supervisor, team leader, peer or any combination. Many organizations schedule interviews to involve employees who will supervise or work with the applicant. Interviews may be conducted by individuals or groups.

- **Individual interviews:** These interviews follow a traditional format in which the applicant is involved in a conversation with one interviewer at a time. The selection process may consist of a series of individual interviews, to factor in several interviewers' impressions of the applicant.
- **Group or team interviews:** These interviews involve a select group of

people conducting the interview together. An interview structure and protocol is established to ensure the required qualifications and characteristics are assessed. Ratings and perspectives are discussed after the interview. Team interviews can save time. They allow the candidate to be interviewed by a variety of people, and enable a diverse evaluation of the applicant's suitability for the position.

Team interviews can be structured to allow the candidate's future call center team members to participate in the interview process. New-hires may orient to the team more easily if they were able to interact with their team members during the interview process. In turn, team members may be more accepting of the new member if they had a role in his/her selection.

Interview Media

Interviews may be conducted by telephone, text-chat and/or face-to-face. Initial interviews by telephone and/or text-chat are recommended for call center positions, since they simulate the job's performance requirements.

- **Telephone:** Conducting an initial in-depth interview by telephone is recommended for call center positions. This medium allows the interviewer to assess an essential requirement – telephone verbal communication skills – prior to inviting the applicant for a face-to-face interview, making it efficient from both a time and cost perspective.
- **Text-chat:** The text-chat interview allows the applicant to demonstrate his or her typing proficiency, ability to communicate via an electronic medium and knowledge of “netspeak,” Internet slang with specialized acronyms, abbreviations and emoticons (keyboard symbols that help convey the intent of the message). This type of interview is appropriate for positions that require handling interactions using text-chat, email or other written forms of communication.
- **Face-to-face:** The most common interview medium, face-to-face conversation provides the opportunity to further assess the pre-screened applicant's communication skills, knowledge and experience. Face-to-face interviews are recommended as a final interview stage, even if telephone and text-chat interviews are conducted.

Preparing for the Interview

All effective interviews require thorough planning and preparation by the interviewer(s).

To prepare for an interview, a manager should:

- Review the job description
- Refer to job competencies to determine appropriate qualification criteria and interview questions
- Read the candidate's application materials; e.g., application, resume, test scores
- Schedule the interview (either telephone, chat or face-to-face) in a location where the conversation will not be overheard or interrupted
- Determine who will participate in the interview
- Set applicant's expectations regarding the duration of the interview, who will be present, if testing will be administered and other pertinent information
- During the interview, prompt the applicant for more detailed answers or specifics, if necessary
- At the end of the interview, discuss next steps and a timeframe for the decision

Selecting Required Employees

Key Points

- Selection is the process of identifying the best candidate or candidates for jobs from among the pool of qualified applicants generated during the recruiting process.
- A carefully planned approach will help managers avoid the risks inherent in the process of selecting employees. The basic steps in the hiring process include:
 1. Screen applicants
 2. Interview applicants
 3. Expose applicants to the work environment
 4. Evaluate candidates
 5. Make the hiring decision
 6. Extend the offer
- The manager coordinating the offer needs to know the organization's policies on how much room he or she has to negotiate since some candidates may make counter-offers.

Explanation

Selection is the process of identifying the best candidate or candidates for jobs from among the pool of qualified applicants generated during the recruiting process. It is important to strictly follow the organization's human resources policies throughout the selection process; ill-advised hiring decisions have cost organizations considerably in terms of public perception, recruiting, legal fees and court-awarded payments. More importantly, a poor selection process can leave an organization without the talents, knowledge, skills and abilities required to meet its objectives. (See *Ensuring Legally Sound Employee Selection*, pp. 19-20.)

A sensible, systematic hiring process will help managers leverage the opportunities – and avoid the risks – inherent in selecting employees. The basic steps in this process include:

- 1. Screen applicants:** Screening tools, such as resumes, applications and tests, filter out candidates who fail to meet the basic requirements of the job. Information collected during screening is useful in assessing the applicant during the evaluation stage of the selection process.

2. Interview applicants: Telephone, text-chat and face-to-face interviews provide in-depth opportunities to learn how well candidates match job-specific criteria. You should be able to tell the candidates about the open position, job responsibilities, work environment, reporting structure and call center goals and objectives. (See *Conducting Effective Interviews*, pp. 11-15.)

It's important to make candidates aware of monitoring policies and practices. This should include a summary of the types of monitoring, purpose and objectives of the monitoring program, and how information from monitoring is used.

3. Expose applicants to the work environment: Spending time observing the call center's operations, usually while sitting side-by-side with a current agent, will help the applicant understand what the job is actually like. It also helps current staff to participate in the selection process and feel ownership for the success of new-hires.

4. Evaluate candidates: During the evaluation phase, it is important to refer only to job-related criteria – the knowledge, skills and abilities that are essential for the job. Established evaluation criteria takes the guesswork out of comparing applicants by using a rating-and-ranking system, or other objective method, to evaluate candidates.

5. Make the hiring decision: The hiring decision should be based on who is most qualified for the job and who is the best fit for the job, team and organization. Documentation of the entire selection process should support this decision. A weighted ranking system is useful in ensuring the most qualified candidate receives the offer.

6. Extend the offer: Verbally communicate the offer to the candidate. You may ask the candidate if she or he is interested in the position, needs more information or would like to take some time to consider it. If the candidate provides you with a verbal acceptance, follow up immediately with a written offer letter. The offer letter should include a summary of the job title and description, compensation and benefits information, the candidate's start date, and the signature of an authorized representative from the organization.

Negotiation

The manager coordinating the offer also needs to know the organization's policies on how much room he or she has to negotiate since some candidates may make counter-offers. Some areas for possible negotiation include:

- **Starting salary:** Some organizations have a policy to start new employees at the base of the salary grade, while others allow negotiation to first

quartile, the midpoint or other thresholds, depending on the candidate's experience and qualifications.

- **Signing bonus:** In a particularly tight or competitive labor market, you may need to negotiate the amount and terms of a signing bonus. Some organizations withhold payment until the employees achieve a certain tenure (e.g., six months).
- **Starting date:** It is customary for candidates to give at least two weeks notice to their current employer. They may want longer to take advantage of financial incentives from their current employer, to complete a contract or assignment or to have some personal time between jobs.
- **Benefits:** Negotiations usually center on the number of weeks of vacation, as many other benefits (e.g., 401k policies) are not subject to negotiation due to federal or state regulations.

Ensuring Legally Sound Employee Selection

Key Points

- Legally sound selection consists of job-related criteria and steers clear of any perception of bias or illegal discrimination.
- To conduct a legal interview, questions for each position should be standardized, documented and asked of each applicant who is being considered for the position.
- Interviewing, hiring and employment issues represent a continually evolving area of the law, so it is important to seek appropriate legal counsel regarding these issues.

Explanation

Title VII of the U.S. Civil Rights Act of 1964 prohibits discrimination based on race, color, gender, religion or national origin. Later laws expanded the interpretation of the Act to include discrimination based on age, disability, veteran status and other factors. Canadian federal and provincial governments have likewise enacted legislation that prohibits illegal discrimination against protected groups.

The appearance of discrimination during the selection process can be prevented by establishing job-related hiring requirements, and creating applicant assessment screening tools and interview questions based on these requirements. It is imperative to consistently apply the same selection criteria to each applicant throughout the selection process.

All hiring requirements (in job descriptions, internal postings, advertisements and other selection documentation), screening tools and interview questions should be reviewed by the organization's HR and/or legal counsel. In addition, all employees involved in interviewing applicants should receive instruction about conducting interviews within legal guidelines.

Screening Applicants

When conducting any screening activities, such as resume sorting, application review, initial screens or testing, be certain that all employees involved in these activities are aware of the job-related criteria and are applying that criteria as they eliminate candidates from the selection process. Employees involved in this process should be aware of legal issues that affect the perception of bias. Some common practices, such as eliminating "over-qualified" resumes for

entry-level positions, have led to successful lawsuits citing age discrimination.

Conducting Legal Interviews

To conduct a legal interview, questions for each position should be standardized, documented and asked of each applicant who is being considered for the position.

When responding to the applicant's answers to standardized questions, you may want to ask non-scripted questions for clarification. Be sure you ask only questions that are directly related to the job and based on job requirements. If you are unsure of a question (you feel it relates to the job requirements and yet it falls within the categories below), check with your HR or legal departments prior to asking it. As a rule, you should not ask questions related to:

- Religion
- Age
- Gender or sexual preference
- Family situation, childcare arrangements, marital status, maiden names
- Citizenship and ethnic background
- Physical conditions/disabilities/health or identifying characteristics such as weight, height, smoking habits, etc.
- Military service or record
- Previous arrests (you may ask about convictions, but not arrests)
- Hobbies and organizations
- Credit rating

Applicant Evaluation and Hiring Decisions

During each step of the selection process, interviewers should make notes and complete standard checklists that rate and rank the applicant's performance. These notes and rankings can serve as a valuable tool in substantiating a hiring decision if they can prove the candidate was or was not hired based on job-related requirements. They can also serve to support a discrimination lawsuit if they are not completed consistently or correctly or point to a discriminatory practice.

Post-interview conversations about applicants' qualifications and interviewers' perspectives should include only job-related criteria and should not include discussion of the applicant's appearance or physical attributes, accent, ethnic heritage or other non-job-related factors.

Although discrimination issues in the call center tend to focus on illegal discrimination, there are some forms of discrimination that, while not illegal, will contribute toward a negative work environment. Nepotism is showing favoritism to relatives when making HR-related decisions. It is rarely considered a favorable practice and many organizations have policies to minimize the chance for conflict of interest. Fairness in the organization's hiring practice is essential if the organization is to be viewed as a fair and equitable place to work.

Getting Legal Advice

Interviewing, hiring and employment issues represent a continually evolving area of the law. It is important for managers to confer with competent HR and legal sources when considering significant changes to policies and processes.



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Call Center Hiring Web Seminar Series, presented by Incoming Calls Management Institute.



About This ICMI Tutorial



This ICMI Tutorial is an excerpt from ICMI's *Call Center People Management Handbook and Study Guide*. Part of a four-volume series developed to prepare call center management professionals for CIAC Certification, these encyclopedic resources cover virtually every aspect of call center management. The other titles in the series are

- *Call Center Operations Management Handbook and Study Guide*,
- *Call Center Customer Relationship Management Handbook and Study Guide*, and
- *Call Center Leadership and Business Handbook and Study Guide*.

All may be ordered at www.incoming.com or by calling 800-672-6177 or 410-267-0700. Quantity discounts available.

If you are considering CIAC Certification, the *Call Center Handbook and Study Guide* series is just one of the options ICMI offers to prepare you for certification testing. Please call or visit www.incoming.com to learn about all of our training resources.



About the Editors

Brad Cleveland is President and CEO of Annapolis, Maryland based Incoming Calls Management Institute. Recognized for his pioneering work in call center management, he has advised organizations ranging from small start-ups to national governments and multinational corporations, and has delivered keynotes and seminars in over 25 countries. Brad has appeared in a wide range of media, including *The Washington Post*, *Wall Street Journal*, and on PBS, CNBC and Knowledge TV. His critically-acclaimed book, *Call Center Management on Fast Forward: Succeeding in Today's Dynamic Inbound Environment*, co-authored with journalist Julia Mayben, is used by call center managers around the world.

Debbie Harne is Director of Educational Services for ICMI, and spearheaded the launch of ICMI Membership, a network of management professionals from over 40 countries. With a background in training and education, Debbie has been instrumental in developing ICMI's technology-based educational services, and has responsibilities for the quality and direction of ICMI's instructor-led and Web-based management seminars. She is proficient in instructional design and ensuring the transfer of training to the job, and has customized ICMI educational services for innovative, in-house study programs in a variety of companies.

How to Contact the Editors

Do you have suggestions for future editions? Comments? Feedback? Please contact us!

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About Incoming Calls Management Institute

Incoming Calls Management Institute (ICMI), based in Annapolis, Maryland, offers the most comprehensive educational resources available for call center (contact center, interaction center, help desk) management professionals. ICMI's focus is helping individuals and organizations understand the dynamics of today's customer contact environment in order to improve performance and achieve superior business results. From the world's first seminar on incoming call center management, to the first conference on call center/Internet integration and subsequent research on multichannel integration, ICMI is a recognized global leader. Quality, usability and value have become trademarks of ICMI's award-winning services. ICMI is independent and is not associated with, owned or subsidized by any industry supplier; ICMI's only source of funding is from those who use its services.

ICMI's services include:

- Public and onsite (private) seminars
- Web seminars and e-learning courses
- Certification review seminars and study guides
- Industry studies and research papers
- Consulting services
- Software tools for scheduling and analysis
- Books (including the industry's best-selling book, *Call Center Management on Fast Forward*)
- *Queue Tips*, the popular (and free) monthly e-newsletter
- Membership in Incoming Calls Management Institute
- *Call Center Management Review*, the authoritative monthly journal for ICMI members

For more information and to join a network of call center leaders, see www.incoming.com.



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