ICMI Online Training Pass
Course Descriptions

Knowledge Bank units

NOTE: All run times are approximate. Individual times will vary.

Courses

The Agent's Impact on the Contact Center

It is suggested that participants first go *through How Contact Centers are Different: An Agent's View* and *Planning and Managing in the Contact Center: An Agent's View* before starting this course since this course builds upon ideas from these other two courses. This course explores what the job of an agent is and whether contact center jobs can be considered a profession. It then summarizes the three areas of agent impact from previous courses and explores the key individual performance objectives of schedule adherence and quality. The course concludes with exploring the agent's specific impact on the five areas of metrics and the five things an agent can do to contribute as a vital part of the team.

Course Materials: A Note-Taking Guide and a Facilitator Guide to blending the learning and with supplemental reinforcement activities for supervisors.
Format: Interactive e-learning
Target Audient: Agents
Total Run Time: Approximately 23 minutes

> **Lesson 1: The Agent's Impact on the Contact Center** (14 mins, 12 secs)
> **Lesson 2: Quiz** (8 mins)

Asking Questions Effectively

During this course, participants will look at close, open, probing, and echo questions and when to use each of these effectively. They will also look at how to use questions to meet their own goals during a contact, how questions help build relationships, and questioning's relationship to listening. As always, the course ends with action planning and a 10 multiple choice question quiz where participants must score at least 80% for the quiz to be marked as complete.

Course Materials: Job Aid and a Facilitator Guide to blending the learning and with supplemental reinforcement activities for supervisors
Format: Interactive e-learning
Target Audience: Agents
Total Run Time: Approximately 26 mins

> **Lesson 1: Asking Questions Effectively (**18 minutes)
> **Lesson 2: Quiz** (8 mins)

Avoiding Escalations

Customer escalations are often caused by agent behavior, the customer not liking the answer, or the customer not wanting to wait for the agent to research or talk with a supervisor. This short course addresses these three categories with tips and suggestions for avoiding the escalation, as well as avoiding word choices that cause escalations, and how to handle the person who wants to escalate right after the greeting. A gamified quiz tests participants' application of their knowledge

Course Materials: Job Aid and a Facilitator Guide to blending the learning and with supplemental reinforcement activities for supervisors.
Format: Interactive e-learning
Target Audience: Agents
Total Run Time: Approximately 30 mins

Lesson 1: Avoiding Escalations (25 mins)
Lesson 2: Quiz (5 mins)

Blending Sales and Service

If every agent could add even a small cross-sell or upsell to every call, the potential for increased revenue would increase dramatically. Through ICMI's Proven Techniques for Blending Sales and Service course, agents learn the fundamental skills and techniques that will give them the confidence to increase their sales potential.

Course Materials: Student Workbook and a Facilitator Guide for blending classroom and online training, if desired
Format: Short recordings with exercises
Target Audience: Agents
Total Run Time: Approximately 1 hour, 47.5 mins

Module 1: Relationship-Driven Sales (Total Run Time: 26 mins)
- 1:1 Relationships in Selling (5 mins, 13 secs)
- 1:2 Introduction to the Four Stages (1 min, 37 secs)
- 1:3 Key Components of the Conversation (4 mins, 52 secs)
- 1:4 A New Model of Selling (6 mins, 21 secs)
- 1:5 Building the Relationship (2 min, 50 secs)
- 1:6 Module 1 Review Quiz (5 mins)

Module 2: The Psychology of Buying (Total Run Time: 11 mins)
- 2:1 The Psychology of Buying (50 secs)
- 2:2 The First Three Insights (1 min, 16 secs)
- 2:3 The Final Four Insights (3 mins, 6 secs)
- 2:4 Module 2 Review Quiz (5 mins)

Module 3: Effective Questioning (Total Run Time: 17.5 mins)
- 3:1 Effective Questioning (3 mins, 53 secs)
- 3:2 Questioning that Meets Goals (5 mins, 37 secs)
- 3:3 Changing the Subject (3 mins, 10 secs)
- 3:4 Module 3 Review Quiz (5 mins)

Module 4: Handling Objections and Closing the Sale (Total Run Time: 18 mins)
- 4:1 Handling Objections and Closing the Sales (1 min, 55 secs)
- 4:2 Five Steps to Handling Objections (7 mins, 51 secs)

4:3 Time to Close (1 min, 50 secs)
4:4 A Note About Price (1 min, 32 secs)
4:5 Module 4 Review Quiz (5 mins)

Module 5: Upselling and Cross-Selling (Total Run Time: 14 mins)

5:1 Upselling and Cross-Selling (1 min, 4 secs)
5:2 Helping the Customer (1 min, 37 secs)
5:3 What to Offer and Why (6 mins, 13 secs)
5:4 Module 5 Review Quiz (5 mins)

Building Product Knowledge for Sales

Why is it so important for sales and service professionals to have a thorough knowledge of their products? And what is the best way to build that knowledge? This course helps answer those questions as well as how to talk to customers about products since it is important to build product knowledge based on how you will talk about the products. We also cover the importance of emotion in making decisions to buy, the importance of trust, features and benefits of products with an exercise to help distinguish between the two, and using value messages to tie customer needs and wants to a benefit. The quiz is a BlockBuster game where the user has to work their way across a grid by correctly answering 5 questions.

Course Materials: Job Aid and a Facilitator Guide to blending the learning and with supplemental reinforcement activities for supervisors.
Format: Interactive e-learning
Target Audience: Agents
Total Run Time: Approximately 21 mins

Lesson 1: Building Product Knowledge for Sales (16 mins, 9 secs)
Lesson 2: Quiz (5 mins)

Building Rapport with Customers

How do you get customers comfortable with sharing information with you and, therefore, make the most of the limited time you have with them? You build rapport quickly at the beginning of the call, and that is what this course is all about. First, we establish what rapport is and provide two sample phone calls—one where rapport is built and one where it is not. Then we provide 10 techniques for building rapport with customers. The quiz presents 5 customer scenarios and the participant has to choose from a poor, OK, and best response, earning points for their selections.

Course Materials: Job Aid and a Facilitator Guide to blending the learning and with supplemental reinforcement activities for supervisors.
Format: Interactive e-learning
Target Audience: Agents
Total Run Time: Approximately 21 mins

Lesson 1: Building Rapport with Customers (16 mins)
Lesson 2: Quiz (5 mins)

Choosing Your Words

Words can make a big difference in customer satisfaction, in handle time, and in employee performance. This course talks about how words can make a difference in dealing with customers, the differences between positive and negative language, how to turn negative language into more positive language, and guidelines for choosing your words

Course Materials: Job Aid; handout of positive and negative language lists; handout showing phrases, what customers hear, and a better way to say the same thing; and a Facilitator Guide to blending the learning and with supplemental reinforcement activities for supervisors
Format: Interactive e-learning
Target Audience: Agents
Total Run Time: Approximately 22 mins

Lesson 1: Choosing Your Words (14 mins)
Lesson 2: Quiz (8 mins)

Controlling the Call

The content covers the following topics:

- Definition of Call Control
- Consequences of poor call control and benefits of good call control for agent, customer, and organization
- Strategies for controlling the call
- Mapping the call flow for control

The course has a Quest theme where participants start at Quest Central and proceed through 6 landmarks to arrive at Cape Control. The quiz follows the Quest Map as well, with participants answering one question for each landmark.

Course Materials: Job Aid and a Facilitator Guide to blending the learning and with supplemental reinforcement activities for supervisors
Format: Interactive e-learning
Target Audience: Agents
Total Run Time: Approximately 35 mins

Lesson 1: The Quest for Call Control (25 mins)
Lesson 2: Quest Quiz (7 mins)

Developing a Selling Attitude

This course is geared to agents whose role has evolved from service only to a combined sales and service one or agents whose emotions seem to be up and down constantly, often falling into a defeatist spiral as they get one “no” after another. The introduction emphasizes three guiding principles for all of ICMI's sales courses:

- Relationship focused
- Belief in product, prices, and sales program

- Effective delivery

We also talk about:

- How sales has changed over the last 10 years,
- The characteristics of successful salespersons (with emphasis on how they bring value to customers),
- How sincerity breeds trust and people prefer to buy from people they trust, and
- The four keys for maintaining a positive sales attitude.

The quiz contains 10 true/false questions.

Course Materials: Job Aid, a handout for assessing tendency towards empathy, empathy map templates, and a Facilitator Guide to blending the learning and with supplemental reinforcement activities for supervisors
Format: Interactive e-learning
Target Audience: Agents
Total Run Time: Approximately 18 mins

Lesson 1: Developing a Selling Attitude (10 mins, 3 secs)
Lesson 2: Quiz (8 mins)

Expressing Empathy

Sometimes agents get so focused on the tasks they are doing, that they forget to respond to customers and start to sound robotic. They often need to be reminded to use a human touch in customer contacts. This course looks at what empathy is and why it is important, the four attributes of empathy, strategies for developing more empathy, and how to apologize effectively.

Course Materials: Job Aid, a handout for assessing tendency towards empathy, empathy map templates, and a Facilitator Guide to blending the learning and with supplemental reinforcement activities for supervisors
Format: Interactive e-learning
Target Audience: Agents
Total Run Time: Approximately 20 mins

Lesson 1: Expressing Empathy (11 mins, 9 secs)
Lesson 2: Quiz (8 mins)

Handling the Call Flow

The content covers the following moments in the call flow:

- Creating a positive first impression with your greeting, with samples of good and bad greetings
- Why people dislike being placed on hold and when it is appropriate with steps for assuring the customer feels cared for, with an example recording.
- Why people dislike being transferred, two wording changes to help convey the right message to customers, and steps with examples for warm transfers (including receiving the transfer) and cold transfers.

- When a call back is necessary, steps for arranging the call back and then steps for doing the call back, with examples of each.
- How to present the solution to the customer, especially when the solution is less then desirable or inconvenient for the customers.
- The importance of closing each call to create a positive lasting impression on the caller, regardless of what has happened during the call, with steps and examples.

The quiz consists of 10 multiple-choice questions, and the survey is the normal feedback survey so that ICMI can make future improvements. Participants must score at least 80% on the quiz to have it marked as complete and the survey must be completed for the course to be marked as 100% complete.

Course Materials: Job Aid and a Facilitator Guide to blending the learning and with supplemental reinforcement activities for supervisors
Format: Interactive e-learning
Target Audience: Agents
Total Run Time: Approximately 34 mins

Lesson 1: Handling the Call Flow (26 mins)
Lesson 2: Quiz (8 mins)

How Contact Centers Are Different: An Agent's View

Contact centers are very different from other types of business and this course explores just what makes them so different. The course begins by defining what a contact center is, and then proceeds to examine the 3 perspectives on the contact center--the customers, the organization, and the agents' perspectives. Finally, the course looks at the 3 driving forces in contact centers which are workload arrival patterns, the queue, and customer tolerance factors. The focus throughout the course is how these differences impact what agents experience every day.

Course Materials: A Note-Taking Guide and a Facilitator Guide to blending the learning and with supplemental reinforcement activities for supervisors.
Format: Interactive e-learning
Target Audient: Agents
Total Run Time: Approximately 31 minutes

Lesson 1: How Contact Centers are Different (23 mins, 19 secs)
Lesson 2: Quiz (8 mins)

Listening Actively

Participants will learn:

- What makes listening difficult
- The benefits of good listening for customers, the agent, and the organization
- How to show that you are listening over the phone
- Tips for listening actively

- Ways to become a better listener

Interspersed in the content are five voice mail messages with five follow-up questions for participants to practice listening for details.

The quiz is a Blockbusters game where participants work their way from the left side to the right side of a grid by answering a question correctly for each column of the grid (5 questions). If they answer a question wrong and there are no other available questions for that column, they have blocked themselves and have to start over again.

Course Materials: Job Aid and a Facilitator Guide to blending the learning and with supplemental reinforcement activities for supervisors
Format: Interactive e-learning
Target Audience: Agents
Total Run Time: Approximately 23 mins

Lesson 1: Listening Actively (18 mins)
Lesson 2: Blockbusters Quiz (5 mins)

Managing Difficult Customers

The content covers the following topics:

- Recognizing the three types of difficult customers: abusive, irritating, and unhappy
- Guidelines for handling abusive customer contacts
- Guidelines for handling irritating customer contacts, particularly when to make the customer aware of the irritating behavior
- Signs that a customer may becoming irate.
- Five steps for managing the unhappy/irate customer.
- Additional techniques that help with the difficult customer:
  - Take care of the situation
  - Give or take (negotiating)
  - Educating customers and one-time courtesy actions
  - H.E.L.P. system for saying "no"
  - Reframing the "no"

Course Materials: Job Aid and a Facilitator Guide to blending the learning and with supplemental reinforcement activities for supervisors
Format: Interactive e-learning
Target Audience: Agents
Total Run Time: Approximately 49 mins

Lesson 1: The Types of Difficult Customers (18 mins, 50 secs)
Lesson 2: Guidelines for Handling Difficult Customers (10 mins, 16 secs)
Lesson 3: Additional Techniques for Handling Difficult Customers (14 mins, 40 secs)
Lesson 4: Bingo! (5 mins)

Managing Stress

Stress is all around us, all the time, and can creep up on us unexpectedly, like a sneaky little monster. Agent stress can trigger customer stress, and customer stress can trigger agent stress. This course looks at stress, including six common myths of stress and the most common workplace stressors. It then looks at the signals customers send about their stress and how agents can diffuse that stress. Finally, the course looks at agent stress and the five vital skills for managing your own stress, providing some concrete suggestions for recognizing and attacking their own stress monsters. Stress may be all around us, but we always have choices. If we can make good choices, we will tame our stress monsters.

Course Materials: Job Aid, handouts on relaxation techniques, simple office exercises, and 90 stress-busting ideas, and a Facilitator Guide to blending the learning and with supplemental reinforcement activities for supervisors.
Format: Interactive e-learning
Target Audience: Agents
Total Run Time: Approximately 28 mins

Lesson 1: Managing Stress (23 mins)
Lesson 2: Quiz (5 mins)

Planning and Managing in the Contact Center: An Agent's View

How do Contact Centers develop schedules? If I am late, why can't I just stay and make up the time at end of shift? Why does everyone get so upset if I don't use the precisely correct phone code? Why do they keep changing my break time? These are all questions that agents might wonder about and this course is designed to answer those questions and many more. We go through the 9-step planning and management process to see how these steps impact agents, as well as how agents impact what happens in the contact center. Learn about Service Level and Response Time, Forecasting, Erlang C, Occupancy, the Power of One, and the challenge of scheduling to call variability.

Course Materials: A Note-Taking Guide and a Facilitator Guide to blending the learning and with supplemental reinforcement activities for supervisors.
Format: Interactive e-learning
Target Audient: Agents
Total Run Time: Approximately 32 minutes

Lesson 1: Planning & Managing in the Contact Center (24 mins, 8 secs)
Lesson 2: Quiz (8 mins)

Presenting for Sales

Effective delivery in sales presentations is one of the three important guiding principles for sales. It can make or break the sale and can make it possible to build a relationship of trust with the prospect that can lead to the sale. This course looks at some general guidelines for effective and professional sales presentations and then spends time looking at how to ask questions that are part of a purposeful sales conversation. Additionally, we present strategies for when the conversation gets stuck or when the prospect throws something unusual into the conversation and the sales person needs a moment to think. The quiz contains 10 multiple choice questions.

New!

Course Materials: Job aid and a Facilitator Guide for blending the learning and with supplemental reinforcement activities for supervisors.
Format: Interactive e-learning
Target Audient: Agents
Total Run Time: Approximately 26 minutes

Lesson 1: Presenting for Sales (17 min, 36 sec)
Lesson 2: Quiz (8 min)

Selling, Step-by-Step

Selling has changed a lot over the last 10-15 years, and this course focuses on a sales model that revolves around the prospect with the sales person in an advisory role.

New!

The six steps of the sales model used in the course are:

1. Build Rapport
2. Qualify
3. Offer a Solution
4. Overcome Objections
5. Offer Other Solutions
6. Close Positively

In the first step, separate branches are offered for inbound and for outbound calls. Each section of the course ends with a related sales situation where the participant has to choose the correct action to take, testing their ability to apply the information just covered. The quiz is a Bingo game. Participants have to answer correctly 5 questions that fall in a horizontal, vertical, or diagonal row on the Bingo card. They have 25 spaces on the card that present 25 different questions. The lesson is marked complete when the participant has scored a Bingo!

Course Materials: Job aid and a Facilitator Guide for blending the learning and with supplemental reinforcement activities for supervisors.
Format: Interactive e-learning
Target Audient: Agents
Total Run Time: Approximately 39-41 minutes

Lesson 1: Selling, Step-by-Step (34 – 36 min, depending on options chosen)
Lesson 2: Bingo! Quiz (5 min)

Understanding People and Buying

The course explores seven insights about why people buy – the psychology of buying. After each insight is explained, users are presented with 1 or 2 questions to help them apply the insight to their own particular situation. Near the end of the course, users have the opportunity to print out the questions with their own answers for future reference. Those who thoughtfully answer the questions come away with a guide that can help them improve their own sales efforts. The quiz is 10 true/false questions with feedback on wrong answers.

New!

Course Materials: Job aid and a Facilitator Guide for blending the learning and with supplemental reinforcement activities for supervisors.
Format: Interactive e-learning
Target Audient: Agents
Total Run Time: Approximately 21 minutes

Lesson 1: Understanding People and Buying (15 min, 37 sec)
Lesson 2: Quiz (5 min)

Using Your Voice

An agent's voice is a primary communication tool on the phone and this course focuses on voice qualities and how agents can use them to their best advantage. We define volume, pitch, inflection, tone, and pace, while identifying best practices for improving these voice qualities and using them to good effect. We also talk about enunciation: the factors that make speech indistinct, examples of frequently mispronounced words, and guidelines for speaking clearly. The quiz is a crossword puzzle with 11 clues.

Course Materials: Two job aids, a list of frequently mispronounced words, and a Facilitator Guide for blending the learning and with supplemental reinforcement activities for supervisors.
Format: Interactive e-learning
Target Audient: Agents
Total Run Time: Approximately 29 minutes

Lesson 1: Your Voice Matters (11 min)
Lesson 2: Speaking Clearly (10 min)
Lesson 2: Crossword Puzzle (8 mins)

Written Communication Skills

As more organizations push customer contacts to online channels, agents must learn the art of customer service through the written word. Through ICMI's Connecting with Customers through Written Channels course, agents learn the most strategic ways to present email, chat, and social media correspondence, so customers have consistent and positive experiences with the organization.

Course Materials: Student Workbook and a Facilitator Guide for blending classroom and online training, if desired
Format: Short recordings with exercises
Target Audience: Agents
Total Run Time: Approximately 1 hour, 54 mins

Module 1: Email (Total Run Time: 40 mins)
- 1:1 Customer Expectations (5 mins, 1 sec)
- 1:2 Email Framework (4 mins, 17 secs)
- 1:3 Interpretation (6 mins 42 secs)
- 1:4 Determine Your Response (5 mins, 25 secs)
- 1:5 Opening the Email (5 mins, 55 secs)
- 1:6 Inviting Interaction (5 mins, 21 secs)
- 1:7 The Conclusion (2 mins, 17 secs)
- 1:8 Module 1 Review Quiz (5 mins)

Module 2: Chat (Total Run Time: 12 mins)
- 2:1 Chat: What's the Difference? (3 mins)
- 2:2 The Core Expectations (31 secs)
- 2:3 Effective Chat Customer Service (3 mins, 31 secs)
- 2:4 Module 2 Review Quiz (5 mins)

Module 3: Social Media (Total Run Time: 15 mins)
- 3:1 Rising Customer Expectations (2 mins, 20 secs)
- 3:2 Components of Social Service Success (4 mins, 4 secs)
- 3:3 Your Response Key Considerations (3 mins, 26 secs)
- 3:4 Module 3 Review Quiz (5 mins)

Module 4: Content and Tone Guidelines (Total Run Time: 24 mins)
- 4:1 The Inverted Pyramid (4 mins, 48 secs)
- 4:2 Precise Words (4 mins, 35 secs)
- 4:3 Simple Explanations (2 mins, 13 secs)
- 4:4 Grammar and Spelling (54 secs)
- 4:5 Tone Guidelines (6 mins, 13 secs)
- 4:6 Module 4 Review Quiz (5 mins)

Module 5: Grammar and Online Etiquette (Total Run Time: 23 mins)
- 5:1 Common Grammar Errors (4 mins, 48 secs)
- 5:2 Writing Confusables (4 mins, 51 secs)
- 5:3 Online Etiquette (8 mins, 6 secs)
- 5:4 Module 5 Review Quiz (5 mins)

Supervising Other People (Agent Coaching Series #1)

In the context of helping a new supervisor, Ruth Ann, this course explores what it means to move from being an agent to being a supervisor, juggling all the different responsibilities of a supervisor, engaging employees, building trust with employees, and managing performance. Each module begins with a conversation that introduces content, followed by activities to apply that content in various ways. Come join Ruth Anne as she works with a Management Coach and some experienced supervisors to overcome challenges in supervising other people.

Course Materials: Relevant handouts are included in each module.
Format: Interactive eLearning
Target Audience: First time or experienced supervisors
Total Run Time: Approximately 1 hour, 36 mins

Module 1: Moving into Supervision (17 mins)
Module 2: People Supervision Responsibilities (18 mins)
Module 3: Employee Engagement (14 mins)
Module 4: The Importance of Trust (23 mins)
Module 5: Performance Management (24 mins)

Giving Feedback (Agent Coaching Series #2)

This course continues to follow Ruth Ann, a fairly new supervisor with only two months experience. She works with her Management Coach and two other more experienced supervisors to learn about: The differences between feedback and coaching, making feedback constructive, delivering constructive feedback, the importance of delivering positive feedback, and giving feedback to different generations.

Course Materials: Relevant handouts are included in each module.
Format: Interactive eLearning
Target Audience: First time or experienced supervisors
Total Run Time: Approximately 1 hour, 16 mins

Module 1: Feedback vs. Coaching (10 mins)
Module 2: Making Feedback Constructive (13 mins)
Module 3: Delivering Constructive Feedback (15 mins)
Module 4: Positive Feedback (17 mins)
Module 5: Feedback Across Generations (21 mins)

Coaching Agents (Agent Coaching Series #3)

In this last course in the Agent Coaching Series, Ruth Ann, a new supervisor now with 3 months' experience, combines what she learned in the first two courses with new information to improve her coaching of her agents. The course is presented in 5 sections divided into 10 lessons.

Course Materials: Relevant handouts are included in each module.
Format: Interactive eLearning
Target Audience: First time or experienced supervisors
Total Run Time: Approximately 2 hours, 40 mins

Module 1: What Coaching is All About (with review game) (Total Run Time: 20 mins)
Module 2: Analyzing Performance Issues (Total Run Time: 51 mins)

2.1: Trends Analysis (9 mins)
2.2 Root Cause Analysis (11 mins)
2.3 Diagnosing the Situation (13 mins)
2.4 Sherlock Coach (review game) (19 mins)
Module 3: Coaching Tools and Techniques (Total Run Time: 53 mins)
3.1 A Coaching Process and Model (17 mins)
3.2 Coaching Tips (for preparing, delivering, praising, and afterwards) (24 mins)
3.3 Coaching BINGO! (12 mins)
Module 4: Common Coaching Challenges (Total Run Time: 24 mins)
Module 5: Coaching Wrap-Up (Total Run Time: 12 mins)

Contact Center Fundamentals

Gain a clear understanding of the unique contact center operating environment and factors in managing that environment through ICMI's Contact Center Fundamentals. Evolving customer expectations, the rise of social media, proliferating contact channels, and the heightened strategic role of customer services are changing contact centers dramatically, making a firm understanding of the fundamentals even more critical.

Course Materials: Course Guide containing exercises and note-taking guide
Format: Short recordings with exercises
Target Audience: Managers, Supervisors, Quality, Workforce Management, Trainers
Total Run Time: Approximately 2 hours, 12 mins

Module 1: The Dynamic Contact Center Profession (Total Run Time: 24.5 mins)
1:1 True or False? (4 mins, 27 secs)
1:2 What is a Contact Center? (8 mins, 6 secs)
1:3 What is Contact Center Management? (3 mins, 37 secs)
1:4 The Role We Play (3 mins, 15 secs)
1:5 Module 1 Review Quiz (5 mins)
Module 2: The Planning and Management Process (Total Run Time: 1 hour, 23 mins)
2:1 Three Driving Forces (13 mins, 1 secs)
2:2 Choosing Objectives (4 mins, 15 secs)
2:3 Planning Data (3 mins, 43 secs)
2:4 The Forecast (5 mins, 48 secs)
2:5 Arrival Patterns (12 mins, 39 secs)
2:6 Using Erlang (11 mins, 38 secs)
2:7 The Six Immutable Laws (4 mins, 14 secs)
2:8 Calculating Response Time (4 mins, 50 secs)
2:9 Shrinkage (7 mins, 7 secs)
2:10 The Schedule (7 mins, 38 secs)
2:11 Service Level Revisited (3 mins, 21 secs)
2:12 Module 2 Review Quiz (5 mins)
Module 3: Effective Real-Time Management and Recovery (Total Run Time: 18 mins)
3:1 The Reality of Real-Time Management (3 mins, 48 secs)
3:2 Principle One: Effective Communication (1 min, 18 secs)

3:3 Principle Two: Monitoring Real-Time (1 min, 19 secs)
3:4 Principle Three: An Escalation Plan (5 mins, 41 secs)
3:5 Examining the Root Causes (49 secs)
3:6 Module 3 Review Quiz (5 mins)

Module 4: Improving Quality and Productivity (Total Run Time: 18.5 mins)
4:1 Seven Quality Principles (1 min, 11 secs)
4:2 Meeting Customer Expectations (2 mins, 24 secs)
4:3 The Quality and Service Level Relationship (5 mins, 32 secs)
4:4 Key Performance Objectives (4 mins, 30 secs)
4:5 Module 4 Review Quiz (5 mins)

Module 5: Summary and Next Steps (Total Run Time: 7.5 mins)
5:1 The 12 Characteristics of Leading Centers (2 mins, 11 secs)
5:2 Your Responsibilities (1 min, 44 secs)
5:3 True or False (reprise) (3 mins, 39 secs)

Forecasting, Staffing, and Scheduling

Provides a basic understanding of the many considerations in forecasting, staffing, and scheduling in the Contact Center. Move from the very basics of defining each task, to calculating a forecast, calculating staff, creating schedules, and analyzing the effectiveness of these efforts. You will have opportunities to record your own observations as well as try out your skills. Each Module ends with a Knowledge Check to verify your understanding of the material as well as help you retain and apply the most important concepts.

Course Materials: Note-taking guides are provided within each module.
Format: Interactive eLearning
Target Audience: Workforce Management, Managers
Total Run Time: Approximately 2 hours, 50 mins

Module 1: Forecasting: What it is and why it's important (8 min, 19 secs)
Module 2: Major Forecasting Steps (15 mins, 47 secs)
Module 3: Quantitative Approach to Forecasting (16 mins, 32 secs)
Module 4: Breaking Down a Forecast (24 mins, 22 secs)
Module 5: Blending in Judgment (12 mins)
Module 6: Forecast Accuracy (15 mins, 37 secs)
Module 7: Calculating Base Staff (24 mins, 25 secs)
Module 8: Calculating Staff for Scheduling (16 mins, 20 secs)
Module 9: Creating Schedules (12 mins, 39 secs)
Module 10: Basic Scheduling Analysis (18 mins, 26 secs)

Hiring and Onboarding

Revised March 2016

Turnover statistics at most contact centers reveal a truly scary picture with a lot of work, effort, and money going to waste. Want to figure out how to reduce your costs and effort? Then implement a strong hiring and onboarding program to find the right employees and get them up-to-speed quickly and effectively.

This text-based interactive course will follow a contact center manager, Regina, as she starts up a new center and develops job descriptions and a recruitment plan, screens and interviews candidates, makes offers, and finally onboards with orientation, training, and a transition plan for moving from training to production. You can proceed at your own pace through each of the 4 lessons, and focus on the material that is most important in your situation.

Course materials: Relevant handouts are included where appropriate.
Format: Text-based Interactive eLearning
Target Audience: Supervisors, Managers or anyone involved with hiring and/or onboarding
Total Run Time: Approximately 1 hour, 15 mins (Times will vary with reading speed.)

- Introduction (5 mins, 7 secs)
- First Considerations (27 mins, 38 secs)
- Selecting the Right People (23 mins, 5 secs)
- Onboarding New Hires (19 mins, 20 secs)

Motivation through Collaboration

Gain an understanding of the relationships and dynamics of culture and how it impacts employee commitment and performance. Plus, learn a framework for building a supporting culture under various organizational structures and conditions.

Course materials: Copy of the presentation, a self-inspection of your culture, team profile, sample gap analysis, and several related industry articles.
Format: Recorded online presentation with handouts
Target Audience: Managers
Total Run Time: Approximately 1 hour, 9 mins

More than Metrics: Harnessing Data to Drive Performance

Includes a breakdown of metric accountability by level (identifying which metrics the agent's impact, managers, directors, etc.), and how to best communicate results and performance to each respective group. Metrics are broken into five categories, and the primary and secondary measures in each category are explained. The course is presented in three parts for convenience.

Course materials: Copy of the presentation, handout for calculating turnover/attrition, an example of Voice of the Customer (VOC), and some recommended articles.
Format: Recorded online presentation with handouts
Target Audience: Managers, Supervisors
Total Run Time: Approximately 51.5 mins

Quality Monitoring Series

This course contains three recordings:

1. *Designing a Quality Program:* Learn a step-by-step process for designing a comprehensive monitoring program that will effectively attain continuous quality improvement. (31.5 mins)

2. *Setting Agent Performance Targets:* Get the most out of monitoring by establishing performance standards that will achieve optimum results within your call center. (38.5 mins)
3. *Creating Effective Monitoring Forms:* Learn how to create and best utilize the forms necessary for achieving your organization's monitoring objectives. (28 mins)

Course materials: Copies of the presentations and handouts
Format: Recorded online presentation with handouts
Target Audience: Quality staff, Managers
Total Run Time: Approximately 1 hour 38 mins

Knowledge Bank

These modules are text-based, and easy to reference to clarify concepts and other contact center knowledge. Many of the modules have brief exercises at the end which help reinforce the information, enabling users to test their understanding and increase their retention. No scores are recorded, but completions of the units are tracked for reports.

Course materials: eBook .pdf for printing
Format: eBook with exercises

Operations Knowledge Bank

The Role of the Contact Center

The Dynamic Contact Center
Customer Expectations and Organizational Value
Inbound, Outbound, and Blended Centers

The Driving Forces of Contact Centers

Three driving forces
Workload Arrival Types
Visible or Invisible Queue
Factors Affecting Customer Tolerance

Establishing and using Service Level and Response Time Objectives

Introduction to the Planning & Management Process
Definitions and use of service level and response time
Alternative Service Level Calculations
Choosing SL and RT Objectives
The Relationship of SL and Quality

Forecasting Definitions, Principles, & Methodologies

Forecasting Principles and Methodologies
Key forecasting definitions and timeframes
Dominant call patterns
Breaking down a time series forecast
Incorporating Average Handling Time
Blending in Judgment

Staffing Calculations and Queue Dynamics

Queueing Formulas and Simulations
Calculating base staff for service level contacts
The impact of SL on Longest wait
Calculating trunks and system resources
Immutable Laws of Contact Centers
Long Contacts
Peaked Traffic

Forecasting and Staffing for Non-Phone Contact Channels

Calculating base staff for Response Time contacts
Email response management systems
Calculating base staff for outbound calls
Dialers
Web communication channels
Staffing for web chat
Social media
Staffing for social interactions

Scheduling Principles and Methodologies

Calculating shrinkage
Scheduling considerations and applications
Full time equivalents (FTEs)
Workforce Management Systems

Real-Time Management

Interpreting real-time information
Alternatives for Providing Real time Information
Setting real-time thresholds
Informational and delay announcements
Establishing and using real-time tactics

Routing and Self-Service Options

Implications of Agent group structure
Skills-based routing
ACD Systems
Multichannel routing
Networked environments
IVR/Voice processing capabilities

Measuring Quality

Identifying performance measures
Contact quality
First contact resolution / errors and rework

Measuring Accessibility

Service Level and Response Time
Average speed of answer
Abandoned and blocked calls

Measuring Efficiency

Forecasted call load vs. actual
Scheduled staff vs. Actual
Average Handling Time (AHT)
Occupancy
Agent utilization

Measuring Cost Performance

Cost per Contact
Average Contact Value
Revenue
Budget/Cost objectives

Measuring Strategic Impact

Customer satisfaction
Employee satisfaction
Turnover
Objectives for outbound
Overall contact center ROI
Performance measures as interrelated outcomes

Building a Technology Strategy

Key technology trends
CTI capabilities
Voice over IP and SIP
Multichannel routing
Creating an enabling technology strategy (strategic)
The technology adoption lifecycle
Developing the business case
Managing new technology implementation

Site Selection Considerations (strategic)

Site selection considerations (strategic)
The phases of design (strategic)
Determining space and workstation requirements (strategic)
Multichannel routing
Lighting and noise considerations (strategic)
Individual comfort and protection

Disaster Recover

Elements of protection and recovery
What disaster plans cover
Calculating the cost of being out of business

ICMI Online Training Pass
Course Descriptions

Customers Knowledge Bank

Key Customer Management Principles
Managing the Customer Experience: Terms and Definitions
Key Principles of Managing the Customer Experience
Evolving Customer Expectations (no exercise)
The Value of Customer Satisfaction and Loyalty
The Contact Center's Role in Managing the Customer Experience (no exercise)

Defining and Segmenting Customers
Customer Valuation Alternatives
Customer Profile and Segmentation Strategies
The Contact Center's Role in Customer Segmentation

Measuring Customer Satisfaction
Customer Satisfaction Measurement Principles
Sources of Customer Satisfaction Data
Survey Methodologies
Sampling and Analysis Principles

Contributors to Customer Satisfaction
Interpreting and Leveraging Customer Feedback [Strategic]
Identifying Contributors to Customer Satisfaction
Barriers to Serving Customers Effectively

Establishing Effective Strategies
Components of an Organization-wide Customer Experience Strategy
Developing a Customer Access Strategy
Common Organization-wide Objectives
Sampling and Analysis Principles
Building Executive Sponsorship and Support
Quantifying the Benefits of Customer Experience Initiatives

Cross-Functional Leverage
Establishing Essential Cross-Functional Networks of People and Support
Disseminating Business Intelligence to Appropriate Stakeholders

Providing Enabling Technologies
Customer Management Technologies
Collecting and Analyzing Customer Intelligence
Designing and Improving Self-Service Systems

Establishing Supporting Processes

- Fulfilling Brand Promises to Customers
- Managing Customer Complaints
- Protecting Customer Data
- The Role of Business Rules
- Empowering People to Build Customer Relationships