

CALL CENTER MANAGEMENT **Review**[®]

Strategies & Solutions for Call Center Professionals Worldwide

Agent Training and Performance Development



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2006 Agent Training and Performance Development Survey Results

With so much parity in the products and services offered by competing organizations, it's the "experience" a customer has with an organization that typically determines whether or not he or she will stick with that organization for any length of time. Leading enterprises fully understand this and, as a result, have made it a priority to provide their contact centers' agents with the tools they need to not only satisfy but delight callers.

"Tools" refers to much more than technologies. As important as technology is for handling callers efficiently and effectively, the most critical tools in the contact center today are agent training and performance development. It is training that enables agents to gain the confidence of, truly connect with, and create valuable relationships with each customer. Customers are rarely dazzled by technology; they are dazzled by courtesy, knowledge, professionalism, empathy, understanding and humor. Such things can be provided only by people, and only by people who are well-trained, and who feel valued for and empowered by the skills and knowledge that they wield.

The relatively recent transition from process- and cost-centric operations to customer- and agent-centric contact centers has led to numerous changes and improvements to the face of agent training and development. To better gauge the extent of such change and improvement, ICMI conducted a targeted survey on the topic of training and performance development in May 2006. In all, 218 contact center professionals representing a wide array of center sizes, industries and geographic regions responded.

What follows are the intriguing and insightful findings uncovered by that survey:

- Half of the respondents work in smaller contact centers; 27.6% in centers with fewer than 20 agents, and 23% in centers with 21 to 50 agents. The remaining respondents manage and/or supervise centers ranging from 51 to more than 500 agent seats.
- The five most common industries represented in the study include Financial Services (25.3%), Medical Healthcare (9.7%), Telecommunications

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(6.9%), Manufacturing (6.5%) and Computers/Software (4.1%).

- Respondents were asked about the average length of time of their new-hire agent training program; the most common response (40.6%) was three to four weeks.

Another 24% work in centers where initial training lasts five to six weeks, and 18% indicated that such training lasts one to two weeks. One in 10 respondents (10.1%) work in centers with unusually extensive new-hire training initiatives—eight weeks or longer.

- Most centers have enhanced new-hire education by integrating non-classroom based training into the program. Only 4.6% of respondents indicated using a 100% classroom-based training program. Nearly one in five responding centers (23.5%) indicated having a new-hire training initiative comprised of between 80% to 99% classroom coursework. Another 21.7% reported that just 60% to 79% of initial training took place in the classroom, and 16.1% stick trainees in the classroom for just 40% to 59% of total training. The remaining responding centers (34.1%) spend even less time in the classroom with new-hires; in fact, 13.4% reported providing no classroom-based training whatsoever.

- The top three types of training used by centers to supplement traditional classroom training include:

1. Job-shadowing (where trainees sit side-by-side with agents while the latter handle customer contacts): 71% of respondents reported using this method “very often”; 22% “often”

2. Mentoring (where trainees work closely with experienced agents to learn the ropes): 51% “very often”; 35% “often”

3. Transition training (a.k.a. “nesting” or “incubation”—in which trainees work in a “nesting area” where they handle basic contact types with ample supervision): 37% do this “very often”; 34% “often”

Other common non-classroom training methods include corporate intranet/knowledgebase (27% use this “very often”; 34% “often”) and self-study via manuals, workbooks and/or other reading materials (20% said

“very often”; 39% “often”). Somewhat surprising is the apparent underutilization of e-learning tools by responding centers; only 12% and 27% of respondents reported using such tools “very often” or “often,” respectively, in new-hire training.

- In the vast majority (68.7%) of responding centers, new-hire training is led by a dedicated call center trainer/training team. Other respondents indicated that initial training is headed up by a supervisor (18.9%) or manager (5.1%). In several innovative centers surveyed, such training is led by experienced agents, usually with a supervisor or manager serving as a safety net. Interestingly, not a single center indicated that they used a third-party training firm to handle new-hire training.

- According to survey respondents, the top five topics/skills covered in new-hire training include:

1. Telephone skills (89.4%)
2. Customer service skills (87.1%)
3. Corporate policies/culture/mission/values (83.4%)
4. Technology training—workflows, desktop tools, email/chat apps, etc. (82.5%)
5. Key contact center terms/processes (75.6%)

Other common skills covered include verbal communication skills (69.6%) and complaint management (65%). Despite the influx of text-based communication in today’s contact centers (via email and chat), only 28.6% of respondents indicated providing training on written communication skills.

- Only 59% of responding centers provide each agent with a customized performance development plan to help the agent improve in key areas and continually evolve in the contact center. When asked how often the performance plan is reviewed and revised and/or updated, 28.9% of respondents said once a quarter; another 25% said once a month; 21.1% said once every six months; and 20.3% indicated that they reviewed and/or updated each agent’s performance plan just once a year.

- The vast majority of centers (87.9%) provide agents with 100 hours or less of ongoing training (training provided after new-hire training is complete) per year; 61.4%

provide zero to 50 hours of ongoing training each year, while another 26.5% provide 51 to 100 hours of ongoing training annually.

- Two in three centers (66.5%) feel that their agents do not receive enough ongoing training.

- The three most common ways ongoing training is delivered in responding centers include:

1. One-on-one coaching/mentoring (44% use “very often”; 38% use “often”)
2. Classroom instruction (23% use “very often”; 35% use “often”)
3. Corporate intranet/knowledgebase (14% use “very often”; 37% use “often”)

Other common ways centers deliver ongoing training to agents include having them shadow more experienced agents (14% use “very often”; 34% use “often”); self-study via manuals, workbooks or other materials (12% use “very often”; 29% use “often”); and e-learning modules (9% use “very often”; 22% use “often”).

- Of considerable concern is that only 42.8% of centers have a formal process in place for measuring the results of agent training. Among these centers, 88% measure the effectiveness of training/level of learning (via tests and on-the-job assessments/monitoring), and 76.1% measure agent satisfaction with training (via surveys). However, only a dismal 15.2% measure training’s return on investment (ROI).

- The top five training challenges cited by responding centers include:

1. Delivering team/group training without disrupting service levels (60% found this to be “very challenging”; 20% said it was “moderately challenging”)
2. Getting new-hires adequately trained in time to fill staffing gaps (46% “very challenging”; 36% “moderately challenging”)

3. Delivering ongoing training/coaching in a timely manner (23% “very challenging”; 45% “moderately challenging”)

4. Measuring the results of training (30% “very challenging”; 33% “moderately challenging”)

5. Ensuring that new-hires grasp the importance/value of their position (24% “very challenging”; 36% “moderately challenging”)

Other formidable training challenges include determining the ongoing training/development needs for each individual agent (16% “very challenging”; 44% “moderately challenging”); securing adequate funds/budget for training (16% “very challenging”; 30% “moderately challenging”); and fairly compensating agents for new/advanced skills attained (20% “very challenging”; 22% “moderately challenging”)

- Respondents shared the key training changes and improvements their contact centers have planned for the next 12 months. The following are the top five:

1. Provide more timely ongoing training/coaching (57.4%)
2. More effectively measure the results of training (50.8%)
3. Get experienced agents more involved in training (46.7%)
4. Increase the number of hours of ongoing training per agent (45.2%)
5. Make training more enticing/fun (42.1%)

Additional planned changes/improvements worth noting include improving the skills and/or capabilities of those who provide training (40.1%); investing more in e-learning (36%); and taking a more “performance management” approach to training—where each agent receives a customized development plan and related coaching and training (34.5%). ■

Developing a Contact Center Training Strategy

An effective training strategy determines intermediate to long-term training priorities, objectives and direction, and should align with the center's overall objectives and strategies.

Training is often identified as the solution to all call center ills. However, it should be deemed necessary only when it has been determined that training is required to ensure that employees will meet performance expectations, when the benefits of training are greater than the consequences of not training, and when training is the most cost-effective solution to the problem or opportunity.

Elements of a Training Strategy

The following are essential elements of an effective training strategy:

- **Alignment with organizational and call center objectives:** Training initiatives must be tied to overall organizational and call center objectives. Training initiatives should be driven by business needs, contribute to the goals of the entire organization, and provide individuals with the skills and knowledge they need to improve their performance and increase their value to the organization.
- **Senior management support:** The effect of call center training on the organization's customer acquisition and retention strategy must be understood by all levels of the organization's senior management to ensure ongoing financial support.
- **Involvement of call center managers:** The best results occur when the skills acquired through training programs are practiced in a simulated environment and immediately applied to real job situations. Even if training programs are well-designed, desired results may not be achieved if the work environment does not reinforce the skills and knowledge taught in the program. Call center supervisors and managers must be held accountable to monitor and coach employees' demonstration of critical skills and knowledge acquired in training.
- **Quality in program design, development, delivery and evaluation:** A successful training program directly supports business objectives. Participants learn what was intended and knowledge is successfully transferred and demonstrated. Development should conform with the principles of instructional design and adult learning methodologies. Program delivery should include opportunities for participant interaction and for realistic application of concepts learned. Finally, the effectiveness of training should be evaluated according to actual changes in performance.
- **Motivation of participants:** Employee motivation may affect participant's ability to learn successfully. If expectations, objectives and valid reasons for the training are not communicated or if the program does not have management support or the proper facilities, participants may not be motivated to learn. Conversely, high morale encourages self-study, informal on-the-job training and enthusiastic participation in training, all of which facilitate a learning environment.
- **Integration with human resource management policy:** Training initiatives should be tied to key HR initiatives. For example, training programs must meet legal requirements, as well as fit cultural and developmental HR standards.
- **Inclusion in workforce management planning:** The scheduling of training must be integrated into the workforce management plan. This is typically done through a rostered staff factor (or shrink factor) that includes the number of agents that will be unavailable to handle contacts because of various activities, including training. Communication among call center managers, trainers and the workforce management team is vital to providing time for training and meeting service levels.

Working with HR and Outside Providers

A training agreement with human resources or outside firms to provide training usually contains the following elements:

- Roles and responsibilities
- Project plans and timelines
- Needs assessment to determine the gaps in performance
- Establishment of requirements for the learning experience
- Identification of necessary subject-matter experts for collaboration on content development, as well as learning strategies and delivery
- The administration and logistical responsibilities associated with training
- Followup to ensure use of knowledge and skills on the job

Strategic Decisions

There are a number of important strategic decisions to be made when designing the training strategy, including:

- **Focus:** Who requires training—an individual, a team, a call center or the enterprise?
- **Development:** Who should direct and review the development of training materials to ensure alignment with training objectives?
- **Location:** Should the training be performed on-the-job, within the call center or offsite?
- **Provider:** Should the training be developed within the call center and/or training department or purchased from outside sources?
- **Content:** Should the content be customized or can it be generic and purchased “off the shelf”?
- **Make or buy:** Should courseware be designed and developed in-house or purchased from outside of the organization?
- **Facilitator:** Should the facilitator be a trained call center subject-matter expert, an internal trainer or an external trainer?
- **Delivery:** Should the delivery be adapted to personal learning styles or can everyone learn the same way (e.g., all classroom or Web-based)?
- **Evaluation:** How will success be measured and determined?

As with other aspects of strategic planning, budgetary limitations should not be an initial consideration. Rather, the training plan should be developed first, and then the resources sought to implement the plan. If resources are unavailable, the training plan may have to be revised. However, to allow budgetary factors to drive training often leads to ineffective or unnecessary training.

Linking the Business Needs to Needs Assessment

Training initiatives should be linked to business requirements and supportive of management objectives. The call center training department must demonstrate how a training initiative will assist management and agents in supporting the needs and expectations of customers and the organization. Further, training should be conducted when the benefits are greater than the consequences for not training. In other words, training should support a clear business need and the training plan should be the most cost-effective solution to the identified opportunity or problem.

Many managers wisely use a return-on-investment (ROI) model to decide when training is appropriate. While ROI is an important tool in making training decisions, it should not be the sole deciding factor. For example:

- Some essential training programs expect a negative ROI (e.g., health and safety programs and government compliance issues).
- A positive training ROI does not guarantee successful implementation. An ROI analysis might indicate that additional training would enable agents to cross-sell/upsell an organization’s products and services. However, if the organization is not willing to support resulting higher average handling times, training will be ineffective.

In short, a training program’s ROI should not be considered in a vacuum. It must be considered within the larger context of the organization’s goals and direction. ■

Excerpted from ICMI’s *Call Center People Management Handbook and Study Guide*

The End of Agent Training as We Know It

Traditional classroom training techniques are giving way to blended tools and a focus on performance development.



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Those who think that traditional classroom training is the be-all and end-all in call centers have a lot to learn.

So do a call center's agents. That's precisely why so many centers have embraced new training tools and approaches aimed at increasing learning efficiency and effectiveness—and, ultimately—both employee and customer loyalty.

Dissipating are the days where groups of new-hires are piled into a room and hit with anywhere from two to six weeks of one-size-fits-all training led by a supervisor. Also fading are the days where existing agents are forced to abandon their workstations every time they need to learn a new skill or improve an old one. Today, training is being delivered on-demand, online, just in time, from a distance and even by agents themselves. Agents no longer dread sitting through static lectures on new products and services; rather they look forward to, embrace—even request—specific types of dynamic training that are aligned with both their and the organization's goals.

Now, this is not to suggest that classroom training is dead. Traditional training will always have a place in and make an impact on agent learning. However, as experts point out, new tools and an increased focus on eclecticism and performance development are helping to bring about the end of agent training as we know it.

“The old days of sending everyone [through the same] training program and then thinking training is complete are

becoming obsolete,” says Sharon Daniels, CEO of training solutions firm Achieve-Global. “Organizations realize that classroom training has a purpose in developing strong skills through practice and feedback. They also know that blended solutions—e-learning and classroom—when implemented well, can yield strong results.”

Anne Nickerson, president of Call Center Coach—a training and consulting firm specializing in customer contact, agrees. “While I don't think that classroom training will ever go away... I do think that classroom training is more efficient with the use of knowledge-based systems and simulation technology.”

Agent Education Evolving

Just as customer expectations and contact channels are evolving, so is training in the call center. Here's a look at the tools and tactics many are using to enhance agent education and development—and centerwide performance.

ASYNCHRONOUS WEB-BASED TRAINING

This has become the most common, and most effective, method of e-learning. Asynchronous WBT refers to online training modules that are completed by the agent at his or her own pace, typically at his or her desktop, without the presence of a live instructor. The training can be provided at any time, and agents can re-access and review it any time from their PC. The best modules are highly interactive; some even have the look and feel that other agents and an instructor are present.

Call centers often use asynchronous WBT modules to reinforce—but not replace—material covered in new-hire classroom training. Such modules enable trainees to practice key skills and test their knowledge of new principles they've just learned. Some include life-like call simulations where the agent “handles” simulated customer contacts, thus increasing their confidence prior to taking calls from real customers on the phone floor.

Many centers also use asynchronous WBT modules to foster ongoing learning and advancement. Studies have shown that what agents want more than just about anything else is the opportunity to continuously grow in the call center and the organization, and that an effective WBT strategy can play a critical role in providing that opportunity. Centers that create a wide variety of WBT modules covering a diverse range of key skill/knowledge sets enable all agents to advance at their own pace—and the call center to perpetually enhance overall performance and agent retention.

The most progressive centers have taken advantage of the latest WBT tools—those that enable supervisors to quickly create and send agents short, personalized videos that cover problem areas recognized during a monitoring session. These tools, such as Envision Telephony's Click2Coach, serve as an extension of the center's monitoring software, and let agents see (via video demonstration) and hear (via the supervisor's voice-over explanation) how they could have handled a particular contact better.

“It provides us with a powerful coaching tool to put information and training at agents' fingertips,” says Tim Burkhart, director of customer care at Fossil, which uses the Click2Coach product. “[If there is] a single coaching issue that needs to be communicated to a specific [agent], Click2Coach enables us to deliver this message without having the agent leave their workstation.”

While it sounds like a lot of work to create customized coaching modules on the fly, most tools have features that enable supervisors and coaches to easily insert documents, graphics, audio (including call recordings) and video clips into modules that can then be sent directly to the agent's desktop. To help further save time—and to ensure consistency—most centers that use e-coaching tools incorporate existing coaching and training materials and

templates into customized modules whenever possible.

Whether using asynchronous WBT to bolster new-hire training, ongoing training or monitoring feedback, experts emphasize the importance of not dispensing with face-to-face interaction. Too many centers, unfortunately, have done just that, says Daniels of AchieveGlobal. “E-learning still requires the manager to coach and mentor the skills and desired behavior change. Often, managers don't plan for reinforcement of skills, thus the impact of the Web/e-learning is minimized.”

TRANSITION TRAINING

When it comes to hot training trends, it isn't all about new technologies. Transition training, for example, is all about creating comfort—and enhancing new-hire performance and retention. Rather than throwing trainees to the wolves right after they've completed classroom training, WBT modules and simulations/role plays, the call center creates a “nesting area” (a.k.a., “incubator” or “cocoon”) where new-hires can practice handling real customer contacts in a highly nurturing, controlled environment.

Typical transition training programs last anywhere from one to three weeks, and often are followed by additional classroom and/or Web-based training to help each agent smooth out any rough spots that are discovered while handling contacts in the nesting area. Agents in the nesting area work under the watchful eye of one or two supervisors. Some centers also call on their experienced agents to help oversee the nesting area. “Having agents present to assist with questions and coaching helps to put trainees at ease,” explains Stephanie Morrison, manager of Nationwide's San Antonio Claims Call Center, which has a comprehensive transition training program in place. “We understand that sometimes a trainee feels more comfortable asking a peer for assistance instead of asking somebody on the leadership team.”

Involving veteran agents in transition training is beneficial not only for the trainees; it serves as a powerful learning experience for the veterans as well, according to Frank Saviano, direct or quality assurance and training for Supra Telecom. “Our new-hires are able to make a smooth transition to the phone floor, and experienced agents get a chance to share their knowledge and develop critical supervisory skills.”

MENTORING

Many call centers continue harnessing the power of peer interaction and learning well after initial training has ended. At Georgia Power, for instance, new agents with a weakness in a particular area are matched up with an experienced agent who is proficient in that area. The protégé and mentor sit next to each other on the phone floor, thus enabling the former to easily receive assistance and support from the latter while adjusting to the dynamic nature of call center work. The mentor, in addition to serving as the protégé's personal help desk, helps to develop action plans for improving the protégé's performance.

Some operations, such as Nationwide's San Antonio Claims Call Center, have taken a team-based approach to mentoring, where several experienced agents on a team work closely with each rookie who arrives.

A typical mentor-protégé relationship lasts anywhere from one to three months, depending on the center's and the new-hire's needs. In addition to serving as an empowering coaching and training tool—one that requires little time offline or in classrooms—mentoring fosters lasting camaraderie within the agent ranks. “The agents become very close to one another,” explains Nationwide's Morrison. “And, because of the bond that forms between them [and their mentors], it's very hard for us when we have to change someone from one team to another.”

Key to any mentoring program's success is the selection process. Just because an agent is experienced doesn't necessarily mean that they will thrive as a mentor, says Paula Sacks, a supervisor at Georgia Power's call center. “We look not only for experienced high performers, but for people who are willing to give their time to help make

Keys for Successful Transition Training

Although specific timeframes and processes will vary, consultant Dan Lowe recommends the following components for a successful transition training program.

SET AND COMMUNICATE CLEAR OBJECTIVES

Ensure that everyone involved—trainers, trainees, supervisors and even existing agents—understands the primary objectives of the transition training program. Explain how it is intended to provide trainees with an opportunity to integrate the skills and knowledge they've acquired from the classroom training in a supportive environment where they can ask questions, make mistakes and begin to see how everything they've learned fits together.

DETERMINE TYPES OF CALLS HANDLED

Decide exactly what kinds of calls will be routed to trainees “in transition”; what skills, product and systems knowledge trainees need to have prior to handling those calls; and finally, how long transition training will last.

Some call centers divide transition training into segments in which the trainee practices handling certain call types/skills in the controlled environment, heads back to the classroom for additional instruction, then goes back on the phones to practice handling the new call types/skills.

Note: In many cases, the addition of a transition process to the new-hire training program enables call centers to reduce the classroom time by 10 to 30 percent. The reason for this is that agents often learn key “classroom” concepts while on the phones during transition training.

CREATE A TRANSITION AREA

The primary requirement for the transition bay—or “nesting” area—is that it provides trainees access to the same telecommunications and informational systems that the existing call center agents have. The transition bay need not take space on the phone floor; it can be set up in virtually any room. Focus on replicating the true calling environment as closely as possible.

SELECT TRAINERS/SUPERVISORS TO OVERSEE THE TRANSITION

This is one of the most critical aspects of implementing a successful transition training program. It's essential to carefully choose the right people with the right skills to coach and nurture new-hires on the phones for the first time. Look for candidates who are patient, have strong knowledge of all call types and a proven ability to provide positive feedback.

The agent-to-supervisors ratio should be lower than it is on the official phone floor. While a 15:1 agent-to-supervisor ratio may suffice for experienced agents in the call center, a 5:1 or 7:1 ratio may be necessary in the transition bay to provide the immediate support that trainees need to develop the skills and confidence to succeed in the center.

Source: Dan Lowe, Lowe Consulting Group, published in *Call Center Management Review*, December 2001

somebody else successful. Some of our very best performers have not been selected because they don't want to take time away from their own work."

Even when an agent does seem like an ideal mentor candidate, they still require additional guidance and training to help them succeed in that role, Nickerson points out. "While some individuals are naturals at presenting, there is a different set of skills needed for managing others' learning. Attention to learning aides, participant materials and certification for new trainers is mandatory for creating a consistent experience for learners."

PERFORMANCE MANAGEMENT

Big changes have been made not only to how agent training is delivered, but also to how it is perceived and managed. Many call centers are taking a more holistic approach to learning and development, moving away from the traditional one-size-fits-all type training. In the most forward-thinking centers, individual agent needs and competencies, as well as their personal goals, are carefully considered and help to determine detailed performance development plans that benefit both the center and the agent.

Without such development plans in place, training—and even the job itself—isn't likely to seem meaningful to the agent, says Daniels of AchieveGlobal. "For training to be effective, the learner has to truly understand the performance requirements, and the gaps in his or her knowledge, skills and attitude. With a development plan in place, training takes on a much more focused meaning for the learner, and the organization benefits from the alignment of the learning and the desired outcomes."

Agents in performance management environments receive not only classroom, Web-based and peer-led training to help them achieve their development plan objectives, they are given the opportunity to do so also by completing special projects of interest to them, working on special teams, or completing special coursework.

Agents working in centers that have embraced performance management receive feedback, progress reports and positive recognition on a regular basis. This helps to remove any doubt as to where they stand or what is expected of them, and keeps them continuously inspired to improve and evolve.

The feedback and recognition doesn't always come

Tips for Peer Mentoring Success

Pairing inexperienced staff with a peer mentor is an excellent—though often overlooked—way to ease a new-hire's transition into the fast-paced and often frightening call center environment.

All of the peer mentoring benefits touted by managers and consultants hinge on certain key factors. A solid program requires focused planning, set up and maintenance. Following are tips to help ensure that your program gets off and remains on the right foot:

- Introduce the idea to staff prior to implementation. The level of success of any peer mentoring program is directly proportional to the level of enthusiasm of and buy-in from your existing agents. They are the ones who will carry the program, so it's essential that they fully understand and are committed to the concept.
- Select agents with the right mix for mentoring. Whom you choose to serve as agent mentors will have a huge impact on your program's fate. Rushing through the selection process results not only in poor mentoring, it may alienate qualified agents who should have been selected but weren't. Look for lead reps who not only have high performance statistics, but who have outgoing personalities and the ability to make people feel comfortable.
- Train mentors for success in their new role. Consider dividing your mentor training program into two major modules: 1) how to be an effective mentor, and 2) how your program works.
- Take care in pairing mentors and "protégés." Mentoring is more than just a training tool; it's a way to build relationships that can have a positive impact on call center performance. Prior to selecting partners, evaluate all mentors and new-hires to determine who is most likely to work well together. Pair mentors and mentees according to similarities in personality, interests, regional and ethnic backgrounds, and possibly gender.
- Monitor the relationship and provide guidance. Lead agents may be the stars of the mentoring show, but the manager needs to serve as the director. Be sure to keep an eye on each mentor/protégé pair to ensure that the relationship is thriving. Confirm that mentors are providing the right information and, even more importantly, that the new-hire is learning. Encourage open communication between partners to help them identify and overcome any barriers that may hinder progress. It's a good idea also to occasionally meet with each participant individually to discuss any problems or concerns they may have with the mentoring program or their partner.

Source: "The Power of Peer Mentoring," published in *Call Center Management Review*, June 2002

from a single source. Several call centers have implemented a 360-degree feedback initiative, where agents are appraised by and receive comments from managers, supervisors, trainers, peers and even customers. “By getting specific, well-rounded [360-degree] feedback on competencies and behaviors that are expected in their current position,” says Nickerson, “agents will have a clear picture of ways to use their strengths, and where to focus their development time.”

David Bracken, director of organizational assessments and research services for the consulting firm Personnel Decisions, agrees. “360-degree feedback systems ‘feel’ more reliable than single-rater systems. Multiple raters can provide a variety of perspectives; employees generally assume that those viewpoints will add up to an accurate assessment of an employee’s performance.”

FORMAL MEASUREMENT OF TRAINING’S IMPACT ON THE CENTER/ORGANIZATION

Recent research conducted by the American Society for Training and Development (ASTD) revealed that the best organizations consistently evaluate the impact of training to demonstrate the link between learning and organizational performance. Historically, however, most call centers have dropped the ball with regard to training measurement, says Daniels. “Call centers measure what’s easy to measure—how long training is, who attends, how they score on mastery or behavioral assessment—but struggle to show training’s influence on business results. Call centers should measure how well the implementation works (level 1), how well the learners absorbed and are applying the skills (levels 2 and 3), and if the business is improving overall (level 4).”

Aligning Contact Center Training with Organizationwide Initiatives

The role of the contact center is to support the organization’s mission and help the organization meet its strategic objectives. This effort requires the development of targeted contact center training to improve the effectiveness and increase the contribution of each worker.

To ensure that training objectives are in alignment with organizationwide initiatives, contact center training managers should:

- Operate in tandem with larger training initiatives: Contact center training cannot be developed and implemented in a vacuum. Eliminate the duplication of efforts by sharing resources and materials between contact center and corporate trainers and determine if any training initiatives can be jointly developed. Every effort should be made to design contact center programs that complement and align with larger training initiatives.
- Maximize contact center employees’ knowledge and skills as resources for the organization: The contact center’s value lies in the vast knowledge and skills of individual employees. With primary responsibility for the development of the contact center’s workforce skills and knowledge, training managers have the responsibility to design training programs that will leverage each employee’s potential.
- Make training valuable by providing solutions to critical business issues: Proactive training initiatives should identify strategic business issues (through frequent needs assessment) and be designed to target these critical areas.
- Develop relationships across the organization: The actions of other divisions influence the performance of the contact center and vice versa. Training managers should develop and maintain relationships in other departments within the organization to share ideas and formulate call center training strategies that are in alignment with the rest of the organization. Cross-departmental training and work assignments can facilitate relationship development.
- Understand the corporate culture: Though the contact center may be geographically located far from “corporate headquarters,” the contact center’s culture should reflect the culture of the larger organization. Contact center training, especially new-hire orientation, should reflect the organization’s brand messages and image so that they are conveyed to customers.
- Ensure that training initiatives keep pace with change: The contact center is the eye of the hurricane in most organizations, making it adept at adjusting to change. Contact center training should keep pace with change in the organization and industry and flexibly adapt training initiatives to address change. To stay ahead of the curve, contact center training management should be able to look into the organizational horizon and anticipate future training needs to support organizational objectives.

Source: ICMI’s *Call Center People Management Handbook and Study Guide*

Fortunately, a growing number of call centers are starting to heed Daniel's expert advice. One company—McKesson Corporation—implemented a measurable training initiative with the help of its own agents, and has since realized huge gains in productivity, quality, employee morale and customer satisfaction.

Through the initiative, the center's management and staff identified the specific skills and knowledge required to succeed in various agent positions, defined those skill/knowledge areas in a matrix, assessed each agent based on the matrix (using both self- and mentor-led assessments), then documented in formal development plans the areas in which each agent needed to improve.

Each agent was given six months to get within the acceptable skill/knowledge range for his or her specific position. Not only did all agents do so via self-pace training, the individual and team skills matrices that had been created revealed, over time, a significant increase in the overall skill/knowledge level within the call center. Having a measurable training program in place also helped to expedite cross-training—enabling three separate

groups to consolidate into one.

Susan Evilsizer, manager of support at McKesson's call center in Charlotte, N.C., doesn't really know how the center ever functioned without such a measurable program in place. "All training is now tracked with a value that is consistent for all [agents]. We have assessments that validate their knowledge in each of the different areas they support. We have training agendas to validate what the instructor is teaching. And then there is a class assessment to ensure that individuals get out of the class what they need."

Nickerson commends such a training initiative, as it epitomizes what she feels needs to be done more in our industry. Just don't expect it to be quick or easy, she says.

"The challenge is that it takes a concentrated effort and resources, thus a long term investment, to create valid measurements of performance. Call centers that offer a trainer incentive based on performance of the graduates of their class would certainly go a long way toward supporting this effort. It takes a very well-designed program." ■

About International Customer Management Institute (ICMI)

The International Customer Management Institute (ICMI) is one of the call center industry's most established and respected organizations. Founded in 1985, ICMI delivered the industry's first management-level conferences, educational programs and publications.

While ICMI's path-breaking work continues, the mission remains much the same: to provide resources and expertise that help individuals and organizations improve operational performance, attain superior business results and increase the strategic value of their customer contact services. Today's ICMI melds the traditional focus on consulting, training, and high-level engagement with CMP's strength in media and events to create a powerful one-stop-shop resource. Through the dedication and experience of its team, uncompromised objectivity and results-oriented vision, ICMI has earned a reputation as the industry's most trusted source for:

- Consulting
- Training
- Publications
- Events
- Professional Membership

Through constant innovation and research, ICMI's consulting and training services have become the industry's gold standard. ICMI publications, such as *Call Center Magazine* and *Call Center Management Review*, and events, including the Annual Call Center Exhibition (ACCE) and Call Center Demo and Exhibition conferences, continue to lead the industry. And ICMI's growing membership community now includes professionals representing organizations in over 50 countries.



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