Creating a Learning Environment in the Call Center
Edited by Brad Cleveland and Debbie Harne

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Definitions and Purpose of Training and Development

Key Points

- Two fundamental purposes of training and development include:
  - At the individual level, increase knowledge, skills and abilities for current and future positions.
  - At the call center level, build a wide base of knowledge and increase the ability to implement strategies and achieve objectives.
- Though they are often used interchangeably, learning, training, education and development have distinct definitions.

Explanation

Training and development benefit both the individual and the call center. From an individual perspective, training and development increases knowledge, skills and abilities for current and future positions. From a call center perspective, training and development enables the call center to implement strategies and achieve its short- and long-term objectives. The underlying purpose of training is always to increase performance, skills and/or knowledge in some area. The results of training, however, may be much broader, including increased employee satisfaction or more motivated employees.

Two trends have resulted in training becoming increasingly important in the call center environment. First, many call center managers are placing greater emphasis on finding agents who will fit into the culture of the organization and then training them on appropriate skills rather than finding those with the right skills but who may not fit into the culture and environment. Given the increasing complexity of agent interactions, new-hires often need significant training, not only in company-specific procedures, but also in general skills. Second, given the growth and turnover in many call centers, there is often an ongoing influx of new employees. As new-hires enter the employee mix, upfront and ongoing training becomes paramount to achieving high standards of quality.

Definition of Key Training and Development Terms

Although they are often used interchangeably, the terms learning, training, education and development have distinct definitions. According to HR consultant Leonard Nadler, the terms can be distinguished as follows:
• **Learning**: The acquisition of knowledge, skills and abilities.

• **Training**: Learning with job-specific objectives which enhances knowledge, skills and abilities. Training has a short-term focus.

• **Education**: Learning related to future roles or positions for which the individual is being prepared. Education should relate to career-pathing and succession planning. Education has a short- and long-term focus.

• **Development**: Learning for the general growth of the individual and/or the organization. Development has a long-term focus.
Cultivating a Learning Organization

Key Points

- A learning organization is “skilled at creating, acquiring and transferring knowledge, and at modifying its behavior to reflect new knowledge and insights.”

- Knowledge is the key sustainable source of added value in an organization and is critical to the development of strategic advantage.

- Four primary steps to becoming a learning organization include:
  1. Create an environment supportive of learning
  2. Stimulate the sharing of new ideas across internal/external boundaries
  3. Create learning forums
  4. Establish systems to capture and share learning

Explanation

Harvard Business School professor David Garvin defines a learning organization as “skilled at creating, acquiring and transferring knowledge, and at modifying its behavior to reflect new knowledge and insights” (p. 80). Learning organizations look at the systems and processes contributing to learning as opposed to focusing primarily on specific interventions, such as a training class. This perspective leads to knowledge management and the successful development of an organization’s intellectual capital.

Key assumptions and implications that drive the concept of a learning organization include:

- Knowledge is the key sustainable source of added value in an organization and is critical to the development of strategic advantage. As sources of competitive advantage disappear, the need for a highly knowledgeable, skilled and committed workforce grows. Organizational capabilities based on employee knowledge of customers, markets, products, processes, suppliers, etc., are very hard to imitate.

- Organizational and team learning is dependent upon individual knowledge acquisition. In other words, the skills, knowledge and abilities of individuals are building blocks of organizational and team learning.

- Organizational learning makes it possible for an organization to
transform itself on a continual basis in response to changing conditions (Dixon).

• To maximize success, organizations must tap into individual knowledge, identify ways in which it can be made public and transferable, and capture it so that it becomes part of the “structural capital” of the organization (Walton).

Organizational learning expert Nancy Dixon identifies three overlapping areas of organizational learning activity:

• **Individual learning**: Takes place each time an individual learns; e.g., through classroom training, reading, feedback and coaching, e-learning, job experiences, etc. Individual learning requires that people are encouraged and rewarded for their own initiative. Effective feedback is an enabler to individual learning.

• **Team learning**: Takes place when two or more individuals learn from the same activity; e.g., team activities, training, projects, games, etc.

• **System learning**: Takes place when the organization develops systematic processes to acquire, use and communicate organizational knowledge.

**Business Drivers for Organizational Learning**

The need for call centers to embrace continuous learning stems from the changing requirements of the business and the marketplace. Key business drivers include:

• **Increasing emphasis on knowledge work**: In the past, work was generally 20 percent judgment and 80 percent routine; now most jobs consist much more of decision-making and judgment than routine. In call centers, many routine tasks, such as checking account balances or flight arrivals and departures, are increasingly being handled by self-service options; e.g., Web sites, interactive voice response units, etc. As self-service options continue to become more sophisticated, agents must be equipped with the ability to solve problems and exercise good judgment.

• **Demand for accelerated innovation**: Change is accelerating and most companies cannot develop new ideas and products fast enough. As a result, the call center is constantly adapting to new product lines, service options and customer access channels. The ability of call center employees to manage change through increased knowledge sharing and development is vital to future success.

• **Flexibility of the workforce**: As businesses become increasingly unpredictable and unstable, we can no longer guarantee that the skills needed today are those that will be needed in the future. Organizations
now ask employees to anticipate changes in their field and prepare themselves to work in entirely new areas. Call center managers must encourage self-development to ensure their staff is ready for new challenges.

- **Closer ties to customers and suppliers:** Today’s businesses rely on customer information to drive strategic decisions. As the hub of communication for the organization, call centers must manage customer feedback well. An increasing challenge for call center managers is developing the ability to gain customer insight from each contact the center handles.

- **More global alliances:** Knowledge management and communication sharing become more challenging as organizations are distributed geographically. Call center managers must be able to facilitate organizational learning across all call center sites and the entire enterprise to ensure consistency of service and the maximum benefits from innovation.

### Steps to Becoming a Learning Organization

Garvin suggests there are four primary steps to becoming a learning organization:

1. **Create an environment supportive of learning:** Employees must have time for reflection and analysis. It is important to provide opportunities to assess customer and system needs, problems and strengths and, as a result, invent and test new ideas. An organization that makes learning a priority effectively integrates this into planning and management processes to ensure it occurs.

2. **Stimulate the sharing of new ideas across internal/external boundaries:** Crossfunctional teams and assignments, conferences and meetings with customers and suppliers are a few ways to encourage the sharing of new ideas. As a leader in the organization, call center managers must promote dialogue and inquiry.

3. **Create learning forums:** Learning forums with explicit learning goals can be useful for strategic reviews of products, systems and competitors. The time, resources and attention allocated to these forums can empower employees to collaborate toward new knowledge and its implications.

4. **Establish systems to capture and share learning:** In order for knowledge to be effectively communicated, technology and work processes that encourage people to engage in creating a repository of corporate knowledge must be established.

In order to sustain a learning organization, the organizational culture must
support these steps. Successful organizations will encourage individuals to take responsibility for their own development, recognize and value learning, leverage the increased knowledge of individuals across the organization, and have management structures that share responsibility and decision-making.

Benefits of Learning Organizations

Call centers are in the communication business. Unfortunately, many call center managers have not considered the implications of sharing knowledge and skills within their centers. There are many benefits of developing a learning organization, including:

- Increased speed to market
- Sustainable competitive advantage
- Stronger customer relationships
- More efficient internal systems and processes
- Lower turnover
- Higher level of individual and corporate intellect
- Improved bottom line
- Faster and more cost-effective learning

Development Resources

Since individual professional development is vital to the growth and success of the organization, management must actively support the ongoing development of the staff. Of critical importance is the call center manager’s ability to create a culture supportive of continuous learning. Management must both model and support the development of the call center’s intellectual capital.

Training/development resources should be easily accessible to all employees in the call center. Many organizations develop a training library that provides a designated place for creative thinking and individual learning. The library can be utilized by call center staff during non-peak call times and should provide development resources for a variety of individual needs. This library needs to include current information on a variety of topics that impact the call center. The library should also provide access to relevant online training programs and other electronic resources.

Call center managers should also ensure that the following resources are reasonably available:

- Time of the individual and manager for development
- Training personnel
• Budgeted dollars for training and development
• Technologies for computer-based training
• Senior managements’ time for support and mentoring
• Peers’ time for peer coaching
Knowledge Management Issues

Key Points

• Knowledge management is “the task of developing and exploiting an organization’s tangible and intangible knowledge resources.”

• The major barrier to knowledge management is when individuals do not have the time, support, incentives or desire to share knowledge. It is essential that managers determine what methods and incentives will lead employees to contribute their own knowledge to the organization and seek out the knowledge of others.

• Call centers can contribute significantly to organizationwide knowledge management, enabling:
  • Improved quality and innovation
  • Highly leveraged marketing
  • Efficient delivery of services
  • Additional revenues/sales

Explanation

Consultant Jenny McCune defines knowledge management as “the task of developing and exploiting an organization’s tangible and intangible knowledge resources” (p. 10). An organization’s tangible assets include such things as copyrights, patents, R&D, licenses and product, customer and competitor information. The intangible assets are the knowledge that the employees possess, including professional know-how, experience, skills, their own processes or methods, personal insight and creative solutions. The main objective of knowledge management is to leverage and reuse resources that already exist in the organization so people will not spend time “reinventing the wheel.”

Knowledge management is not just gathering facts, but involves adding actionable value to existing data and information by filtering, synthesizing and summarizing it. Then methods must be developed to help people access the knowledge so they can take action. Employees must find it usable and in a format that is readily available.

In the final analysis, investments in knowledge can increase innovation and productivity, lead to higher return, and sustain long-term economic growth because knowledge doesn’t depreciate the way raw capital does.
Technology Issues

Knowledge management can involve many types of technologies, including groupware programs, data warehouses, Intranets and document management software. Based on the work of McCune, the following table illustrates the major technological aspects of a knowledge management system.

<table>
<thead>
<tr>
<th>Area of focus</th>
<th>Tools</th>
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| Connectivity                                 | • Computer networks  
  • Email  
  • Intranet  
  • Internet |
| Containers (repositories of knowledge)       | • Data warehouses, data marts and assorted databases  
  • Document management programs  
  • Electronic directories or "experts," such as corporate yellow pages and expert systems, which compile information in an intelligent database  
  • Large storage cupboards, usually on a corporate intranet |
| Locators (technology for searching and locating information) | • Browsers  
  • Search engines  
  • Knowledge maps (indices that classify information and help users locate the information they need)  
  • Electronic card catalogues (tools to summarize and categorize data)  
  • Push-and-pull Web technology (enables users to request information or organizations to send information on specific topics) |
| Learning vehicles                            | • Knowledge portals at employees’ desktops for easy access to all useful data in the company  
  • E-learning  
  • Web collaboration software  
  • Web seminars |
| Upcoming technology developments             | • Filters, browsers and locators based on natural language (spoken or written) CTI-enabled solutions that synthesize and interpret information from call center systems |

Supporting Culture

The major barrier to knowledge management is not one of technology, but rather of people. The capture and transmission of human intellect is critical to raising organizational capabilities. Individuals may not have the time, support, incentives or desire to share knowledge. In some cases, they may even feel at risk by sharing knowledge and best practices. It is essential that managers determine what methods and incentives will lead employees to contribute their
own knowledge to the organization and seek out the knowledge of others. This is a management responsibility that is increasingly essential for success in today’s fast-changing landscape.

The Call Center’s Contribution to Organizationwide Knowledge Management

Call centers can contribute significantly to organizationwide knowledge management, by serving as a vehicle for capturing, sharing and leveraging the stream of information from customer contacts. Practical areas of impact include:

- **Improved quality and innovation:** By capturing and assessing customer experiences and input, the call center can pinpoint quality problems with products and services, and enable associated design and manufacturing operations to make necessary improvements. This same stream of information also serves as an R&D goldmine, identifying customer wishes and associated innovation opportunities.

- **Highly leveraged marketing:** By tracking buying trends, capturing customer feedback, analyzing demographic information and establishing “permission-based” marketing campaigns, the call center contributes to an increasingly well-defined understanding of customer needs and wants.

- **Efficient delivery of services:** By helping customers understand and use self-service alternatives, the call center learns how these systems can be modified for more intuitive use, and how to encourage and inform customers about these channels.

- **Additional revenues/sales:** The information call centers acquire in the normal delivery of services leads to a better understanding of customer needs and associated upselling and cross-selling opportunities. This information can enable better designed marketing campaigns, self-service systems, in-person sales and service methodologies and online information systems that key in on these opportunities.

(For a full discussion of how these areas and others contribute to the call center’s value proposition, see ICMI’s *Call Center Leadership and Business Management Handbook and Study Guide.*
Principles of Effective Mentoring

Key Points

- Mentoring refers to experienced employees (mentors) who support and advise less-experienced colleagues (protégés) through their personal and career development. It differs from coaching in that it does not focus on a particular set of skills or knowledge.

- For mentoring to be effective, the mentor must candidly discuss the protégé's strengths and development needs and provide guidance to meeting those needs. In turn, the protégé must accept feedback and pursue identified development opportunities.

Explanation

Professor John Walton defines mentoring as a process whereby “experienced and often senior employees support and advise less-experienced and often younger colleagues through their personal and career development” (p. 193). Mentoring differs from coaching in that it does not focus on a particular set of skills or knowledge. Instead, a mentor guides overall career objectives.

The Basis of the Mentoring Relationship

The relationship between the mentor and the protégé is based on mutual trust and has the capacity to develop over time. Meetings should occur on a regular basis since a good mentoring relationship requires that both parties know each other well. Both should be active listeners and agree to keep confidences. The mentor must candidly discuss the protégé's strengths and development needs and provide guidance to meet those needs. In turn, the protégé must accept feedback and pursue identified development opportunities.

Walton recommends that the two parties develop an agreement that covers:

- Confidentiality
- Duration of the relationship
- Frequency of meetings
- Specific roles of the mentor and protégé
- Desired outcomes; e.g., identifying the protégé's career ambitions and areas of interest
The Skills and Roles of a Mentor

Walton summarizes the characteristics of an effective mentor as follows:

- Confident of and clear about their own position in the organization and not threatened by, or resentful of, their protégé’s opportunities.
- Sufficiently senior level to be well-informed about the organization and able to facilitate the protégé’s opportunities.
- Knowledgeable about the protégé’s area of interest.
- Supportive of the objective of learning, and perceptive of, and committed to, their own responsibilities to the protégé.
- Easily accessible to the protégé and willing to negotiate a planned timetable.
- Already in a positive professional relationship with the protégé.
- Able to treat their mentoring role as an integral part of their own job responsibilities, not an add-on.

Mentor roles encompass the functions of aiding the protégé’s career development and assisting in the development of the protégé’s self-awareness. To do this, mentor roles include:

- Communicator
- Counselor
- Coach
- Advisor
- Referral agent
- Advocate

Mentoring is typically associated with management positions. However, mentoring at the call center agent level can bring agents closer to the company, learn new job tasks, feel like an important part of the larger call center community and provide support during the early stages of working in a call center.

The Power of Peer Mentoring

Pairing inexperienced staff with a peer mentor is an excellent – though often overlooked – way to ease their transition into the fast-paced and often frightening call center environment. And by enabling experienced agents to serve as mentors, you add diversity to the job while providing them with a strong sense of value and pride in their work. The result is higher retention of and performance from both new-hires and seasoned veterans. A formal mentoring program may be just the answer for the many call centers that perennially struggle with employee turnover. Attrition rates tend to be particularly high...
among agents who have only recently completed training. Why? Because that training is often insufficient in preparing them for the unique challenges associated with the agent position and the call center in general, says, Dan Lowe, president of Lowe Consulting Group. “All too often, new-hires go through an initial training session and are then thrown onto the phones where they receive little or no direct support while handling calls. It’s no surprise that call centers that take such an approach often suffer high turnover right after training, as agents find they can’t stay afloat on the phone floor.”

**Tips for Peer Mentoring Success**

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.

So, what makes an agent qualified? Certainly good performance results are an important factor, but choosing mentors solely based on individual performance is a mistake, says Lynda Cannon, manager of human resources and manpower planning for Ruppman Marketing Technologies, a service bureau that has used peer mentoring for several years. “Just because somebody is very good at what they do doesn’t mean they are good at teaching what they do,” explains Cannon. “We 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. The former needn’t be too extensive, assuming the mentor selection process has been carried out with care, says Dr. Bernice Strauss, a psychologist with extensive experience in helping organizations set up mentoring programs. “A workshop on how to mentor should suffice – covering the role and function of a mentor; what the mentee might expect; how to communicate with the mentee, how to keep the relationship going and how to set boundaries.”

The second phase of training is where you brief mentors on their specific responsibilities as well as how, when and where they will be interacting with new-hires.

In addition to clearly defining the mentor role, it’s important to train agents to be respectful of service levels while conducting mentoring sessions. Remind them that, as important as their interaction with new-hires is, customer calls and emails must take priority. Develop policies and guidelines regarding time spent off line/away from workstations and make sure that agents understand them.

- **Take care in pairing mentors and “apprentices.”** 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. Therefore, prior to determining partners, it’s a good idea to evaluate all mentors and new-hires to see who is most likely to work well together.
Forming perfect matches isn't feasible, but pairing people with similar attributes is. As Dr. Strauss recommends, “Match pairs on common points. 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 you as manager/supervisor need to serve as the director. Be sure to keep an eye on each mentor/mentee 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.

Self-Development

Key Points

- Effective self-development requires the learner to take primary responsibility for identifying needs, setting goals and spearheading the learning process.
- Both employees and managers play an essential role in successful self-development.
- Call center managers can benefit from pursuing project assignments in other areas of the organization.

Explanation

According to professor John Walton, self-development stresses that “the learner takes primary responsibility for diagnosing needs and identifying goals; selecting the methods, means, times and places for learning; and evaluating the results. The emphasis is on empowering the learner to act autonomously rather than expecting a third party, such as a trainer, to direct and prescribe” (p. 204).

Self-development should seek to enhance the following areas:
- Current job skills
- The next step in the career path
- Knowledge of new processes and technologies
- Personal and call center vision and direction

A self-development plan should include:
- Areas identified for development
- The goals and objectives of development
- A timeline for completing goals and objectives
- Resources required
- Proposed development activities
- The chosen training method
- A method to evaluate results

Principles of Effective Self-Development

Key principles that further self-development include:
• Develop a personal mission statement.
• Conduct a self-assessment.
• Conduct a 360-evaluation. In a 360-evaluation, input on job performance is received from managers, peers, direct reports and self; these perspectives are then compiled to identify strengths and weaknesses.
• Set realistic goals and timelines.
• Take personal responsibility for career development and progression. Do not abdicate it to others.
• Make enhancing knowledge and skills a higher priority than advancement.
• Cultivate positive relationships with management; develop both internal and external networks of relationships.
• Develop and maintain a positive reputation.

Shared Responsibility

Who is responsible for development, the manager or the employee? The answer is both. Employees should have a vested interest in their continued training and development in order to support the call center, for their internal promotability and external marketability. They should seek feedback, accept responsibility for pursuing a training and development plan, and seek continued knowledge and skills enhancement.

The responsibility of the manager is typically dependent upon the level of the employee. Managers of front-line agents usually play a larger role in the identification of employees' strengths and weaknesses, the selection of training and the evaluation of results. Senior managers, whose direct reports consist of mid-level managers, may leave these responsibilities up to their direct reports. However, regardless of the level of employee, most managers are the ones responsible for budgeting for self-development training for their direct reports.

Diverse Project Assignments

Call centers frequently interact with many other areas of the organization. Assignments in these areas will broaden and deepen the call center manager’s understanding of how the call center fits into the organization, and contribute to the manager’s understanding of the larger call center role. Some particularly useful to emphasize could include:

• Marketing/sales
• Operations/manufacturing
• Information technology/telecommunications
• Finance (especially budgeting)
• Corporate communications
• Legal/compliance
• Human resources
• Training
Reference Bibliography

For Further Study

Books/Studies

*Call Center Recruiting and New-Hire Training: The Best of Call Center Management Review.* Call Center Press, 2002.


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