ICMI Tutorials

Developing and Implementing Training for the Call Center

Edited by Brad Cleveland and Debbie Harne

Contents

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Instructional Design/Development

Key Points

- The traditional design/development model is the Instructional System Design model consisting of five phases:
    1. Analysis
    2. Design
    3. Development
    4. Implementation
    5. Evaluation

- When developing training programs, needs-assessment information should be framed in terms of course objectives, which will drive the course content.

Explanation

Although many call center managers may not develop course content themselves, it is important that they understand principles of effective course design. The traditional design/development model is the Instructional System Design model, which consists of five phases:

1. **Analysis:** Refers to the training needs analysis and identification of the performance metric for tracking.

2. **Design:** Provides the framework for the learning experience, including the course objectives and choice of delivery method.

3. **Development:** The actual content development and instructional strategies that align with the design.

4. **Implementation:** The delivery of the learning experience.

5. **Evaluation:** The decisions and criteria to determine the effectiveness of the training.

Determining Course Objectives and Content

Based on the needs-assessment results and business planning requirements, the call center manager should know what training content is required to improve personnel skills and achieve call center objectives. The needs-assessment information that is to be used for a particular course should be framed in terms of course objectives.

Course objectives are statements of what an individual should be able to do as a result of the training and what he or she should know in order to do it. They should be measurable and/or observable. Some examples include:

Knowledge	Skill/Application
Analyze	Assemble
Classify	Develop
Describe	Calculate
Define	Conduct
Identify	Implement
List	Forecast
Recognize	Negotiate
Select	Plan

Knowledge objectives become the guidelines for the content to be included or excluded in the training course. They also give guidance to the types of learning activities and assessments. For example, if an objective indicates that a person should be able to "list" the products in a product portfolio, then you can assess that knowledge by simply asking them to list them. If you only require them to "recognize" products, you can provide a matching or multiple-choice test.

The skill/application objectives lead to on-the-job application or knowledge transfer. For example, if you want a manager to "demonstrate" the steps in coaching, you can involve them in a role-play and use a behavioral checklist to see if they use those steps. If you want them to "develop" a career path or a disaster recovery plan, you can have them create a plan and assess it against a checklist.

Principles of Effective Content Development

Important principles of effective content development include:

- **Objectives drive the course content:** The content should directly align with and support training objectives.

- **Objectives should be written in a sequence of learning, which then provides the sequence of the content:** For example, a good content structure might be:

    - Introduction
    - Link to previous module
    - Presentation of content
    - Practice content

- Apply content
- Review/summarize

- **Content should be directly related to the job:** The more that course content focuses on the requirements of the job and real call center situations, the greater value for participants and the greater chance of successful knowledge transfer.

Training Courseware

Key Points

- The decision to purchase or develop training courseware requires the evaluation of many different factors, including expertise, cost and customization required.

- When choosing an outside training vendor, the use of a standard evaluation method, such as a weighted scorecard, will assist in determining the best company to meet the training needs.

Explanation

Once training needs have been determined, call center managers must decide if they will purchase training from a outside training firm or develop the training internally, possibly with the help of the HR department. When considering the make or buy decision, key decision factors include:

- Does the internal organization have the time, expertise and internal credibility to develop the learning experience?

- What are the cost factors? For example, what are the initial development costs, ongoing costs for each participant, costs to keep information current?

- Who retains ownership when working with an outside training vendor?

- What degree of customization is required?

- Who will deliver the training? Do facilitators have the appropriate skills and are they credible?

- Does the vendor and organization have compatible values and culture?

- What level of quality is required?

- Is this a stand-alone course or part of a larger curriculum?

- How are skills linked to overall learning objectives?

- Does the training vendor have industry experience? Experience with your organization?

- What is the experience of the vendor's team that will be assigned to the project?

Selecting an Outside Training Vendor

Once the decision has been made to work with an outside training company,

you must decide which company best meets your needs. A traditional method of comparing vendors is through the use of weighted criteria, or a scorecard. The criteria are determined and then weighted by distributing 100 points according to the importance of each item. Finally, a scale is used to evaluate each vendor's abilities to meet the criteria.

Criteria	Weight	X	Ratings	=		Score
Knowledge of the call center industry	10	1	2	3	④	40
Knowledge of the vertical markets	5	1	2	③	4	15
Credibility to the target audience	10	1	2	③	4	30
Leading edge/current materials	10	1	2	③	4	30
Total cost	5	1	②	3	4	10
Ownership of materials	2	①	2	3	4	2
Time to market	10	1	②	3	4	20
Delivery methodology	8	1	2	3	④	32
Delivery capability	10	1	2	3	④	40
Skills of the developers	10	1	2	3	④	40
Compatibility of cultures	10	1	2	3	④	40
Qualified facilitators	10	1	2	3	④	40
Totals	100					339

Scale: 1 = to a very little extent, 2 = to some extent, 3 = to a great extent, 4 = to a very great extent

Example Vendor Evaluation

To determine the score of each vendor, the weighted amount is multiplied by the rating for each item. All of the scores are added together to get each vendor's total evaluation. The vendor with the highest score is typically awarded the project.

Training Delivery Methods

Key Points

- **Deciding which training method is best requires the consideration of many different factors including:**
  - **Classroom training**
  - **Coaching, mentoring and peer-teaching**
  - **Self-paced (hard copy, Web-based, CD-Rom)**
  - **On-the-job training**

Explanation

Today's training landscape provides many different delivery options. Different options are appropriate for different types of training needs and it is important to understand the strengths and weaknesses of each. Deciding which method is best requires consideration of many of the following:

- Costs

- Content

- Learner preferences and styles

- How often the content needs updating (also called "shelf-life")

- Availability of resources (technology, instructors and facilities)

- Organizational culture, goals and objectives

- The geographic dispersion of the learners

- How much time is available for training development

Classroom Training

Classroom training brings participants face-to-face with facilitators. Knowledge and skills are taught through a variety of formats including lectures, multi-media presentations, individual and group activities, and role-plays. Classroom delivery can be centralized, requiring learners to travel to one location, or decentralized, delivering training in multiple locations or via teleconferencing.

Strengths include:

- Highly interactive

- Effective for almost any type of content

- Allows the facilitator to conduct "status checks" to ensure participants are learning and to adjust delivery accordingly

- Can be easily customized to accommodate learner preferences and styles

- Easy to change content from session-to-session

- Training content, participant materials and testing methods can be standardized and reviewed for quality

Weaknesses include:

- Quality is dependent on the availability and skills of facilitators

- Costs may be high (e.g., time, travel and material development)

- Time-of-delivery dependent; may be difficult to train all shifts and absent employees

Coaching, Mentoring and Peer-Teaching

Coaching, mentoring and peer-teaching are appropriate for individual development training needs. Each has a slightly different focus:

- **Coaching:** A performance management technique, which may be performed by a manager or trainer. Through informal, one-on-one discussions, creatively designed activities and frequent monitoring, the coach helps an employee improve performance in a specific skill area. (See ICMI *Tutorial, Monitoring and Coaching Fundamentals*.)

- **Mentoring:** A long-term relationship between a tenured employee (mentor) and a less-experienced worker (protégé). The mentor advises the protégé on issues relating to his or her skill or career path.

- **Peer-teaching:** The peer-teaching approach pairs an employee, often a new-hire, with a peer knowledgeable in call center policies, procedures and protocol. The peer is a source of knowledge, coaching and support as the employee learns essential aspects of his or her job.

Strengths include:

- Appropriate for specific, targeted skills

- Provides frequent on-the-spot coaching and reinforcement of desired skills

- Promotes relationships that are likely to contribute to overall organizational communication and employee satisfaction

- Low cost

Weaknesses include:

- Results dependent on coaching skills and relationship

- Less formal approach is difficult to monitor for effectiveness

- Not feasible for relaying a large body of material to many participants

Self-Paced Study

This method allows individuals to study training materials at their own pace. In many cases, it allows employees to "test out" of material or to study specific aspects of the content at their own choosing. Self-paced delivery methods include:

- Printed materials and workbooks

- A reading program of books and articles

- Online or Web-based training

- CD-Rom based training

- Video or cassette based programs

Strengths include:

- Appropriate for reinforcing existing skills or providing remedial training

- Easy to reach many employees; e.g., part-timers, shift workers, geographically disbursed workforce

- Can ease classroom space requirements

- Can present all learners with the same, standardized experience

- Effective for independent learners

- Web-based or online training allows frequent content updates

Weaknesses include:

- Often not the best option for teaching complex skills

- Self-motivation may be an obstacle for some employees

- CD-Rom training can be difficult and costly to update

- May be difficult to track and monitor progress and on-the-job skills implementation

- E-learning modules and videos are costly to develop

Using Technology-based Training (TBT): Take a Look at the Call Center Environment

When considering the use of TBT in the call center, managers and trainers should keep in mind its limitations and the realities of the call center environment. For example:

1. The call center can be distracting. While agents are used to working in the call center environment, training requires concentration. This can be hard to do at the workstation.

2. Agents may benefit more from a break rather than training. Some companies like TBT because it enables them to integrate training into a call center agent's workday, fitting training in between phone calls. That may be a mixed blessing, says Todd Beck of AchieveGlobal. Agents who have been taking call after call all day with just a few minutes in between may not be able to quickly shift their mindsets when training is routed to them.

In addition, training may be the last thing an agent wants to do with extra time, Beck says. While the training program provides a change of pace, it takes place at the same workstation, using the same screen the agent has looked at all day. In some cases, the agent might be more refreshed and re-energized by standing and stretching, or a quick change of scenery.

3. Off-line practice is important. Don't have agents complete a Web-based seminar or a CD-ROM program, then immediately try their new skills and knowledge out on the phone, Beck advises. "Do you really want their first practice to be with a live customer?" It's more effective to build in opportunities for agents to practice their new skills and knowledge, perhaps during team or shift briefings or by bringing in a facilitator for role-play or practice.

On the plus side, an effective and balanced TBT approach can break up the monotony of static classroom training. The more diverse, individualized and interactive your training program is, the more motivated agents will be to learn — and the better they'll retain information.

Excerpts from "Tap the Potential of Technology-based Call Center Training" by Leslie Hansen Harps and Laurie Solomon, published in *Call Center Management Review*, March 2000.

On-the-Job Training

This method attempts to expose the employee to realistic job situations through observation, guided practice and while working on the job. Through constant feedback and monitoring, the employee is encouraged to take risks and add to his or her body of knowledge with each experience. As part of a formal program, the trainee actually works under the guidance of someone performing the job. Less structured programs may have a looser approach; e.g., supervisor is available to answer questions as needed.

Strengths include:

- Knowledge transfer to the job is virtually guaranteed
- Addresses needs of kinesthetic learners, who learn by doing
- Low cost

Weaknesses include:

- Difficult to monitor the effectiveness of unstructured programs
- May leave new employees feeling lost and unsupported
- Employees may be practicing untested skills on customers

Training Facilitators

Key Points

- **Training for the call center should be done by individuals who are credible to that audience and have solid facilitation skills.**

- **When equipping call center subject matter experts with facilitation skills, it is important to have an established process to ensure the quality of the instructor.**

Explanation

Training for the call center should be conducted by individuals who are credible to that audience. Credibility stems from a combination of education, work experience and facilitation skills. You must decide if it is more appropriate for an individual in the training department or call center to conduct the training. Trainers must have sufficient knowledge of call center dynamics and processes in order to effectively communicate call center-specific information. Call center personnel, on the other hand, must be equipped with facilitation skills (not just presentation skills). Not all call center personnel will be effective trainers, so you must carefully select and train those expected to do the training. More often, it will be easier to equip the trainer with the appropriate call center knowledge than to equip the call center personnel with training expertise.

Another option is to team someone from the call center with a trainer to gain the advantages of each. However, this approach is more costly and requires coordination to ensure learners receive a consistent message.

Facilitator Requirements

Important facilitator requirements include:

- In-depth knowledge of the topic
- Practical experience in topic areas
- Appropriate facilitation skills, including small and large group management, understanding of adult learning methodologies, adherence to training objectives, time management, sense of humor, etc.
- Credibility with the target audience and management
- Commitment to the training process

- Knowledge of the organization
- Knowledge of the industry

Train-the-Trainer Process

When equipping call center subject matter experts with facilitation skills, it is important to have an established process to ensure the quality of the instructor. Steps that should be incorporated into a train-the-trainer process include:

- Select facilitators with at least some proven facilitation skills. If call center personnel are chosen, they should attend facilitation skills training.
- Provide a separate customized training session to train facilitators on the course content, learning strategies and assessments.
- Allow facilitators to co-teach the course with a trained instructor. The trained instructor should observe the new facilitator and provide feedback and coaching.
- Evaluate the facilitator until he or she demonstrates competency to deliver the course.

Barriers to Successful Training

Key Points

- Potential barriers to successful call center training include:
  - Lack of time
  - A poor physical environment
  - Conflicting policies and procedures
  - Fear
  - Poor training design or ineffective delivery
  - Unclear reasons for training
  - Objections not addressed
  - Lack of post-training support
  - Managers aren't positive role models

Explanation

In order for a call center training strategy to be effective, the organization must value the education and training of its employees as an integral part of its culture, policies and procedures, and management decisions. Potential barriers to successful call center training include:

- **Lack of time:** Finding time to train call center agents is a challenge, given the nature of randomly arriving workloads. When service levels drop, training is often the first casualty, even when training may be the very thing that could help most! A sound resource planning and management process must be practiced diligently so that work schedules reflect the additional resources required for necessary training.

- **A poor physical environment:** Classroom training requires a separate space from the call center floor, adequate room for breakout groups and role-play activities, and technology that supports skill application (i.e., phones for practice and role-plays, computers that simulate the agent desktop and access to software in training mode). Computers with multimedia capabilities are required for computer-based training (CBT) and a technologically savvy technician should be available to troubleshoot technology problems in the classroom. Training, whether self-paced CBT, one-on-one or classroom, requires concentration and focus.

- **Conflicting policies and procedures:** Training and development initiatives must be tied to other key goals and objectives in the organization. For example, if a skills-based compensation plan is implemented but agents seldom get approval for training activities, management's objective of increasing agent skills will not be accomplished.

- **Fear:** Fear can be a subtle but powerful barrier. If employees aren't supported and encouraged during the training process or management attempts to motivate by threatening loss of pay, disciplinary action or termination, fear may hamper concentration. Other examples of fear include fear of change, discomfort with new technology, fear of appearing unintelligent or falling behind the rest of the group, and fear of ridicule or rebuke by the co-workers, trainers or supervisors. Potential fear factors must be addressed throughout training and in the organizational culture at large to free employees from this powerful distraction and encourage them to take the risks required to learn and apply new skills.

- **Poor training design or ineffective delivery:** If the training design does not clearly communicate the training objectives or if role-plays, exercises and simulations do not accurately reflect the real work environment, the training may fail to have the desired effect. Similarly, ineffective delivery in the form of poor facilitators will undermine the success of the training program.

- **Unclear reasons for training:** The objectives and goals of the training initiative must be clearly understood and embraced to gain employee buy-in and assist employees in focusing on the training goals. One requirement of adult learners is to understand why the new skill or knowledge is needed, how it will be applied and how it will benefit them. The "what's in it for me?" must be clearly communicated prior to the beginning of the training.

- **Objections not addressed:** Call center managers should anticipate some of the objections agents may have and prepare to overcome them. Common objections to training include:

  - "I don't need training, I already know and do my job well."
  - "That wasn't in my job description."
  - "I can't do this."

  One of the best ways to overcome these issues is to involve agents themselves in the training and development process.

- **Lack of post-training support:** Support, coaching and ongoing guidance is necessary for training to translate into on-the-job performance. While employees may be able to demonstrate the new skill in the training environment, supervisory and training support is imperative to ensure use of the new skill continues and is performed consistently.

- **Managers aren't positive role models:** Managers must "practice what they preach" and embrace call center training initiatives – or risk seriously diminishing the effectiveness of the training.

Adult Learning Principles

Key Points

- **Adults learn differently than children or adolescents. In a training environment, adults:**
  - **Want practical application**
  - **Want their real-life experiences to be recognized and valued**
  - **Are continuous learners and prefer to manage their own learning efforts**
  - **Have varied learning styles**
  - **Need to know why they are learning**
  - **Are motivated most strongly by internal pressures (themselves)**

- **Adult learners require a variety of learning styles that should be accommodated by call center training programs.**

Explanation

It is essential that those involved in making training policies and decisions understand how adults process information and solve problems – how they learn. Adults learn differently than children or adolescents. The following table summarizes important characteristics of adult learners and the implications to call center training programs:

Adult learners:	Implications to call center training programs:
Want practical application	Develop task-centered and problem-centered training programs.
Want their real-life experiences to be recognized and valued	Use the learner's experiences and examples; develop interactive sessions.
Are continuous learners and prefer to manage their own learning efforts	Involve learners in development and evaluation of the programs; encourage self-discovery and action planning.
Have varied learning styles	Use multimedia, varied methods of delivery, accelerated training methods.
Need to know why they are learning	Inform learners of the "why" behind the training before it begins.
Are motivated most by internal pressures (themselves)	Help learners understand the benefit of training to job satisfaction, self-esteem and quality of life.

Note: This table is based on "What Every Trainer Needs to Know About How Agents Learn" by Laurie Solomon, published in *Call Center Management Review*, June 1999.

Learning Styles

Even the most well-intentioned and gifted call center trainers will fail if they focus only on *what* their participants learn and not on *how* they learn. As the Center for Accelerated Learning puts it, "Without action there is no learning. Total learner involvement is essential. Turning a presentation into an activity accelerates and enhances learning. A training course is not something you do to people, or even for people, but with people." (Solomon)

While adults share several general learning traits, they may have a variety of learning styles. The most common learning styles include:

- **Dependent, collaborative or independent:** Some people learn best as they watch a peer (dependent) or discuss possible solutions (collaborative). Other people learn better working on their own (independent). A combination of group activities and individual assignments will provide opportunities for all types of learners.

- **Visual, auditory or kinesthetic:** Learning by seeing, hearing or doing is another learning style differentiator. Classroom and computer-based training should take advantage of a variety of media to engage visual and auditory learners. Kinesthetic learners will benefit most from activities or role-plays.

- **Goal-oriented, activity-oriented or learning-oriented:** To accommodate all three styles, at the outset of training, make learners aware of the ultimate goal, the activity to be accomplished and what will be learned as a result of the training.

Creating and Implementing an Orientation Program

Key Points

- **An orientation program introduces new employees to the call center industry, organization, job and team.**

- **Goals of orientation include:**
  - **Reduce the anxiety and stress for new-hires**
  - **Reduce the burden that the orientation process places on management and peers**
  - **Provide a favorable first impression of the organization**

Explanation

An orientation program introduces new employees to the call center industry, organization, job and team. Key goals of orientation include:

- Reduce the anxiety and stress for new-hires

- Reduce the burden that the orientation process places on management and peers

- Provide a favorable first impression of the organization

Orientation to the Call Center Industry

Working in the call center environment requires all employees to learn specialized vocabulary and unique operating practices. Performance measurement in call centers is different than most other types of business units, so it is important for all employees to understand the "why" behind the practices of the call center. An orientation to the call center industry should include:

- The people who comprise the call center

- The call center as hub of communication for the organization

- Three driving forces of call centers:

  - Random call arrival

  - The psychology of queues

  - Factors of caller tolerance

- A basic understanding of staffing and scheduling, including:

  - Service level

  - Forecasting

- • How base staff is calculated
- • Scheduling considerations
- • Adherence to schedule
- • Quality contact handling
- • Monitoring and coaching
- • Meeting customer expectations

Orientation to the Organization

Orientation to the organization usually contains:

- • Orientation to general organization rules; e.g., start/stop times, basic procedures, use of equipment for personal use, etc.
- • Management philosophy
- • Organizational structure
- • Information about the organization and industry
- • Benefits the organization provides
- • Emphasis on health and safety
- • Behaviors resulting in corporate discipline
- • Information regarding how the call center fits into the enterprise and its strategic direction

Orientation to the Job

Orientation to the job provides information about the realistic demands of the job, the organization's expectations and the work environment.   The orientation should include:

- • A copy of the job description
- • Identification of a peer to act as a mentor and the value of a mentor for long-term success
- • An orientation job aid including what to read and who to contact about certain issues
- • Manuals regarding products, procedures and processes
- • A discussion concerning management expectations and reporting procedures
- • Performance expectations, guidelines and criteria
- • Compensation policies; e.g., performance reviews, timing of merit increases, pay periods, etc.
- • Grievance procedures

- How agent groups are structured and contacts are routed

Orientation to the Team

Many times turnover occurs because the individual is not oriented to the team. The issue is not one of ability to do the work, but of not feeling included. Therefore, management should take steps to quickly build team acceptance of the new employee.

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About This ICMI Tutorial

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

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