



## **Fundamental Knowledge and Skills for Front-Line Reps and Supervisors: Is Your Training Program Covering the Essentials?**

*By  
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Rachel has just finished your agent orientation program and is ready to hit the phones. She's passed the product knowledge test with flying colors and seems to have better than average communications skills. She's actively using the new soft-skills she learned in the final phase of orientation and you're sure she's going to be one of your stars.

But you have this nagging feeling that you've forgotten to teach her something. And you ask yourself, "Is there anything else Rachel should know before she begins her "tour of duty?" Is there any other training she needs that will make her more effective in handling customer contacts, as well as be a more satisfied call center employee?"

The answer is "yes". There's one more piece. The missing link here is to equip Rachel with knowledge about the unique call center environment and how it operates. Let's face it – she's had to learn a lot in the last few weeks. And part of that training should have been an operational overview so Rachel can better understand the context in which she plays such an important role.

So what exactly do new employees need to learn about the call center? We asked agents and supervisors alike what the missing pieces were and below is their "Top 5" list. How many of these areas are you covering in your own training program?

### **1. The Profession and the Industry**

How many of your staff understand the world of call centers? It's important for them to understand the vital role your own call center plays in the organization, as well as the bigger picture of call centers everywhere. Rachel should understand that this is more than "just answering the phones", but a mission-critical part of businesses everywhere – a bona fide profession, not just an in-between stop on the way to a "real" job.

Include information about industry demographics (types and sizes of centers, as well as the numbers of folks that work in the profession). And make them aware of the career opportunities and professional development options available to them in this industry. This type of awareness will help your retention efforts in the long run, as well as increase job satisfaction in the short term.

### **2. Performance Measurement**

Do your staff understand what you're measuring every day in terms of the call center's overall performance as well as individual performance? It's useful for them to understand what the call center's performance goals are in terms of service and efficiency (and perhaps revenue) in support of the company's overall objectives. Perhaps the center gathers marketing data and focuses on customer input for future product and service offerings. Rachel should understand



how these call center operational goals then translate down into measures of her own performance.

Include training on performance measures, with particular emphasis on all the items an agent will be measured on and why. Every person should understand how his/her performance will be evaluated and understand what they can do to affect those numbers and scores.

### **3. Workforce Management**

Do your staff understand why management is so obsessed with everyone being in their seat and adhering to their work schedule? It's critical for them to understand the basics of the workforce management process and the impact on service and cost of getting the "just right" number of people in place to handle the calls. Rachel should understand the effect on service she has if she's not available when scheduled and what that also means in terms of how busy her co-workers will be.

Include training on how the forecasting and scheduling process works in your center. Every person should understand how workforce schedules are created, and the impact that just one person can make on service and cost.

### **4. Call Center Technology**

Do your staff understand how the calls they're taking right now arrived at their desktop and what the customer has experienced to the point at which live conversation begins? It's helpful for them to understand the overall concept of how a call or contact arrives at their workstation, as well as what technologies enable them to handle calls more effectively once they arrive. Rachel should understand what her customer has experienced in terms of IVR self-service or sitting in the ACD queue before she picked up the call. She should also fully understand the capabilities of all the technology at her disposal in terms of handling each call (such as CTI or contact management systems).

Include training on how a contact gets from the customer to the desktop, and what the communications process is like for customers. Every person should understand what technologies are available to them in handling the call more efficiently, as well as have a basic understanding of the other technologies at work "behind the scenes" in the call center in terms of workforce management system, quality monitoring, workflow management, and more.

### **5. Customer Relationships**

Do your staff understand the value of each and every customer call? While we're not suggesting they whip out a calculator on every call, it is important for front-line staff to understand the concept of lifetime customer value so the proper emphasis on service is placed. Rachel should understand that while one single call might not seem that important, when the average value is multiplied over a "lifetime" of calls, every interaction can be significant in customer retention.

Include training on lifetime customer value and the critical role that each agent plays in customer retention and the bottom line. And if you have a CRM strategy and CRM technologies in place, it's important to help the front line staff understand how that strategy affects them in handling contacts. Will they follow different scripts for a "high value" customer, or will performance



measures change as more focus is placed on the quality of the call handling process versus traditional efficiency measures such as speed of answer and average handle time.

Including these five components in your front-line staff's orientation program will go a long way in equipping them with the knowledge to better understand the context in which their role is performed. Without this background, staff like Rachel may never perform up to their potential.

### **Supervisors Need Training Too**

In all too many situations, specific call center training ends at the front-line staff level. In survey's we've done over the past couple of years, The Call Center School has found that over 80% of supervisors in call centers today were moved into that position from being a front-line agent. And while most new supervisors receive training on general supervisory skills, only about 20% of these supervisors receive any more advanced call center operational training.

Below is a checklist of the various knowledge and skills needed by supervisors in today's call center, in addition to general supervisory and leadership skills. How do your supervisors measure up?



People Management	Operations Management
<b>Organizational Structure/Teams:</b> Can they describe the different types or organizational op and team structures?	<b>ACD Routing and Reports:</b> Do they understand ACD setting and how they're used? What reports are available and how to get them?
<b>Recruiting, Screening, Hiring:</b> Can they outline job descriptions and hiring criteria? Inte and screen effectively?	<b>Call Forecasting:</b> Do they know how the forecast is created? What factors influ and how staffing is affected by various factors?
<b>Training and Assessment:</b> Can they effectively assess new and existing staff skills, gaps, and recommend needed training?	<b>Staffing Calculations:</b> Do they know how forecasts get translated into staff numbers how to calculate cost and service tradeoffs?
<b>Staff Retention:</b> Do they understand all the factors that lead to staff turno how they can contribute to improved retention?	<b>Scheduling Solutions:</b> Are they aware of how schedules get created and what types of short-term and long-term solutions are available?
<b>Setting Performance Standards:</b> Can they create/update qualitative standards that are mea and objective that track critical performance?	<b>Call Center Performance Measures:</b> Do they understand what call center measures need to be in pl support corporate objectives?
<b>Measuring and Diagnosing Performance:</b> Do they know how to objectively measure performance a to diagnose problems to create improvement plans?	<b>Call Delivery and Networking:</b> Do they understand how a contact travels and where things ca wrong in the network and how to react?
<b>Coaching, Monitoring, and Counseling:</b> Do they understand the difference and can they apply pro principles of coaching and counseling for call center issu	<b>Call Center Technologies:</b> Do they understand how to use all the center's technologies (I WFM, QM, CTI) to manage staff effectively?
<b>Motivation Techniques:</b> Do they understand how to identify what motivates staff how to implement motivation programs in the center?	<b>Call Center Math:</b> Do they understand the numbers and how to apply them in ma service levels and staff performance?
<b>Workplace Design:</b> Do they understand the basic elements of effective workp design and how to make changes for improved productiv	<b>Staffing Alternatives:</b> Do they understand the various staffing options that may be u such as outsourcing, telecommuting, or contracting?

### Return on Investment

Benjamin Franklin perhaps said it best, "An investment in knowledge pays the biggest returns." Whether it's filling in some gaps in your agent training and orientation program, or implementing an expanded supervisory/management training curriculum, you'll find that the time and money invested will pay for themselves many times over in terms of increased call center operational efficiency, improved service, and decreased staff turnover.

### About the Author....

Penny Reynolds is a Founding Partner of **The Call Center School**, a Nashville, Tennessee based consulting and education company. The company provides a wide range of educational offerings for call center professionals, including traditional classroom courses, web-based seminars, and self-paced e-learning programs at the manager, supervisor, and front-line staff level. For more information, see [www.thecallcenterschool.com](http://www.thecallcenterschool.com) or call 615-812-8400