

Customer Care Center Facilitator Guide

Management Training: Problem-solving

By learning about variables such as strategic thought, risk, the consideration of possibilities, and applying focus, supervisors gain the ability to develop the problem-solving strategies that will cover managing both their team and their individual agents.

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Facilitator Guide – Problem-solving

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Each lesson portrayed in these materials contains screen captures from the actual classroom slides. The slides are shown here in the same order as presented in the classroom slides.

Presentation Icon Legend

Icon	Description
	Exercise identifies when activities take place during the delivery.
	Facilitated Discussion identifies when discussions led by the facilitator take place during the training.
	Call identifies a call that should be played for the agents.
	Handout identifies materials for the participant to reference for additional or specific information.
	Review identifies when the facilitator should review important points that were covered during the training.
	Present identifies when the PowerPoint should be used to show additional information not in the facilitator guide.
	Click identifies click-based animation. Look for the icon in the narrative to know when to advance to the next piece of information.
	eLearn identifies blended learning opportunities where participants will engage with an interactive eLearning component instead of facilitator presentation for learning content.

Facilitator Hint: View the presentation in Full Screen Mode by selecting the Slide Show tab on the ribbon, then selecting the From Beginning tool in the Start Slide Show group.

Management Training: Problem-solving

Purpose: This facilitator guide is designed to be used in conjunction with the facilitator materials listed below in a classroom environment. The terminal learning objective for the lesson is to apply the steps of problem-solving to solve team and employee issues.

Participants: Customer care center supervisors

Lesson Time: 2.5 hours

Facilitator Materials	Participant Materials
<ul style="list-style-type: none"> ▪ Laptop ▪ Projector, screen ▪ Flip Chart – prepared with the title: <i>Problem-solving Matrix (create the matrix that includes the appropriate questions found within the section 3.6 Step 1: Define the Problem)</i> ▪ Master copy of N/A ▪ Wall adhesive for chart paper ▪ Facilitator guide ▪ PowerPoint presentations: <ul style="list-style-type: none"> ▪ Lesson 1 – N/A ▪ Computer Based Training Modules: <ul style="list-style-type: none"> ▪ Lesson 1 – N/A 	<ul style="list-style-type: none"> Pen or pencil Handouts: eLearning aid Problem-solving Quick Aid Participant Problem-solving Scenario Worksheet Facilitator Problem-solving Activity Guide

Lesson Agenda	
Time	Task
11:30 – 11:45 a.m.	Review previous day's learning
11:45-11:50 a.m.	Introduction
11:50 – 12:00 p.m.	Overview and Objectives
12:00 – 12:30 p.m.	Lunch
12:30 – 12:35 p.m.	What is Problem-solving
12:35 – 12:40 p.m.	Four Steps of Problem-solving
12:40 – 1:25 p.m.	Step 1: Define the Problem
1:25 – 1:40 p.m.	Step 2: Generate Solutions
1:40 – 1:50 p.m.	Step 3: Select Solutions
1:50 – 2:00 p.m.	Step 4: Evaluate the Solutions
2:00 – 2:30 p.m.	Summary
2:30 – 2:45 p.m.	Break
Total Time:	2.5 hours

1. Introduction – 5 minutes

Say:

Problem-solving and root cause analysis are key skillsets that everyone can benefit by. They require strategic thought, risk, consideration of possibilities, and focus.

**Ask:**

What types of problem-solving and root cause analysis processes or models are you currently familiar with?

Facilitator Note:

If no one mentioned *the five whys*, then explain *the five why process*, which is simply asking “why” five times to understand the root cause to problems. Also, explain that there are several models that can be used such as the fishbone diagram and others. For the purposes of this training, we will focus on a root cause analysis model that focuses on not only individual but also environmental factors.

Facilitator Notes

2. Overview and Objectives – 10 minutes



Ask:

What is an example of a problem you'd like to solve, in your role of call center supervisor?

What do you already know about problem-solving?

What would you like to learn about problem-solving?

Say:

In this lesson, you will learn about:

1. Identify the steps of problem-solving
2. Use the root cause analysis matrix to understand root cause to performance gaps

Ask:

In what way will these topics benefit you as a supervisor?

Say:

By understanding how to solve problems in a systematic way, you will be better able to provide solutions that make a difference.

Let's review the objectives you will achieve for each topic.

Facilitator Notes

3. What is Problem-solving – 5 minutes

Say:

Our natural tendency is to make decisions based on *what has worked before* without understanding the actual problem we face. Some problems can be resolved by using the “what has worked in the past” approach. However, most problems need to be solved by understanding the root cause of the problem and then providing an appropriate solution.

Facilitator Note:

Explain that during this module, we will review a real problem scenario. Ask participants to provide a real scenario and write it on a flip chart or the white board. Let them know we will use this scenario throughout this module.

Facilitator Hint: Make sure that this scenario is relevant and prominent as it will be used throughout the module.

Say:

For problem-solving to be both effective *and* efficient, a process needs to be followed. Let's discuss this process.

Facilitator Notes

4. Four Steps of Problem-solving – 5 minutes

**Say:**

There are four steps to problem-solving. These steps are as follows:

- Define the problem
- Generate solutions
- Select solutions
- Evaluate the solutions

Ask:

Without going into details, in what ways might this process help you in your role as a leader?

Say:

We will explore and see how each step might be used within context by engaging in a group activity that utilization of a root cause analysis tool and group discussion.

Facilitator Notes

5. Step 1: Define the Problem – 45 minutes

Say:

Defining the problem is the first step of problem-solving. You need to define the problem as a problem statement in order to understand the root cause. A problem statement includes the pain points or symptoms of the problem.

Some of the examples of problem statements are:

- Agents are not able to provide customers with tracking information.
- Supervisors do not provide weekly coaching sessions to agents.
- Agents are consistently out of adherence.
- Agents continuously receive low quality evaluation scores.

Ask:

Consider each problem statement. As you look at them, what are the alleged root causes for the symptoms?

Say:

In order to determine the root cause and appropriate solutions, we will now work through your scenario that was previously identified.

Let's begin with defining the problem.

In order to solve the problem, we first have to understand the root cause(s) to the problem. This approach includes two categories:

- Work environment
- Individual employee

Using this approach, or tool, will help determine the root cause to any employees poor performance.

5. Step 1: Define the Problem – 45 minutes



Root Cause Analysis Tool

Have participants access the eLearning aid and take a few minutes to review the root cause analysis tool. Then, find out what questions or comments participants have about the tool.

Direct learners to get into groups of three and review a problem-solving matrix via the eLearning aid.

There are two topics to explore within each category.

- The work environment category includes the topics of information and tools and resources.
- The individual category includes the topics of knowledge and capacity.

Supervisors will need to answer a few questions (within the eLearning support aid) for each topic within both categories. The answers to these questions will provide the key understanding of the root cause to the problem and yield the solution(s) to solve the problem.

Facilitator Note:

Review the root cause analysis tool together with participants and ensure they understand the tool. Make sure participants understand that the information for each environmental and individual factor are questions that must be answered.

For example, the first factor under environment is information. Does the performer have all the information they need to do their job? This information might be job expectations, feedback on recent performance, or familiarity with and knowledge about the respective policies and procedures relating to their job role and performance.

Each of these questions **MUST** be answered in order to determine the root cause of a problem.

Consider providing an example of a situation where this tool helped you solve a problem.

5. Step 1: Define the Problem – 45 minutes



Supervisor Scenario: Root Cause Analysis Walkthrough

Instructions:

Walk through the root-cause analysis tool and ask supervisors the respective questions for the environmental and individual factors.

On a flip chart or white board, creating the following table, and then write down participant responses to the questions.

Environmental Factors	Information	Tools/Resources	Incentives
	<ul style="list-style-type: none"> Does the individual know what is expected of them? Does the individual know how well they are performing? Is the individual given guidance about their performance? 	<ul style="list-style-type: none"> Does the person have the right tools for performance? Are tools and resources designed to match the human factors of performance? 	<ul style="list-style-type: none"> Are monetary and non-monetary incentives available? Are career development opportunities available? Are you providing the right motivation strategies to the person?
Individual Factors	Knowledge	Capacity	Motives
	<ul style="list-style-type: none"> Does the individual have the knowledge and skills to perform as expected? Is well-designed training that matches requirements of performance available? 	<ul style="list-style-type: none"> Is performance scheduled for times when people are at their best? Do people literally have the aptitude and physical ability to perform the job? 	<ul style="list-style-type: none"> Has motivation been assessed? Is the person willing but not able? Is the person able but not willing? Are people recruited to match the realities of the job?

Next, on a flip chart or white board, draw a large triangle, and then label the triangle's points as follows:

- (Top point) Metrics
- (Bottom-left point) Calls/QA
- (Bottom-right point) Agent

Say:

As you can see, the root cause analysis tool focus you on these three considerations, metrics, calls/QA and the agent.

Ask:

Now that we walked through a scenario you provided, what is your reaction or thoughts about this root cause analysis tool?

5. Step 1: Define the Problem – 45 minutes

Facilitator Notes

6. Step 2: Generate Solutions – 15 minutes

Say:

The next step in the problem-solving model is to Generate Solutions. Generating solutions is basically to brainstorm solutions that might work. Let's look at the root causes of the problem we identified.



Ask:

What might be some appropriate solutions we might consider to fix the problems?

Facilitator Note:

Write down participant responses next to the root cause on the white board or flip chart you used before.

Say:

These solutions are simply a brainstormed list of possible solutions. The next step in the problem-solving model is to select the best solutions.

Facilitator Notes

7. Step 3: Select Solutions – 10 minutes

Ask:

Which of the listed solutions would we choose – and why?

Say:

Remember to be thoughtful and strategic in your responses.

Facilitator Note:

Place a check mark next to the solutions that participants agree upon.

Ask:

How do you anticipate these solutions impacting the root causes we identified to the problem?

Say:

This question and your responses lead us to the 4th and final step of the problem-solving model – Evaluate the Solutions.

Facilitator Notes

8. Step 4: Evaluate Solutions – 10 minutes

Say:

Evaluating the solution is one of the more critical steps. When you evaluate a problem, you will determine if the solution fixed the stated problem. If it did not, then you need to:

1. Redefine the problem,
2. Make sure you have gathered enough information to clearly state the problem and the root cause(s).
3. Then, generate solutions and
4. Revise the current solution, or select a new solution.

Ask:

Why is evaluating a solution important? In what way will evaluating a solution help you in your role as a supervisor?

Some of you may be thinking that this process takes more time than you have in real life. Consider instead how it may actually SAVE you time.

Facilitator Note:

Ask participants if they can provide some examples of how using this problem-solving model and the root cause analysis tool might save time.

Say:

Evaluating the effectiveness of solutions to problems is the key to ensuring you have clearly identified the problem – and implemented appropriate solutions.

Facilitator Notes

9. Summary – 30 minutes

Say:

During this module, we discussed problem-solving.

Ask:

- In what ways did we achieve your learning expectations?
- How will the topics we covered help you to develop your desired supervisory skills?

Ask:

- What are the four steps to problem-solving?
- How can this model help you?
- What key takeaways do you have from the problem-solving model and root cause analysis tool?

9. Summary – 30 minutes



Supervisor Scenario: Root Cause Analysis

Instructions: Have participants get into pairs to determine an agent situation. They will need to agree upon the situation and agent. Then, have participants determine the root cause to the agent's performance based on their ability to answer the questions. Point participants to their Participant Guides for a sample for they can use to complete this activity. Remind participants they also need to generate and select solutions and determine how they will evaluate the solution. Have each pair present their problem-solving case to the rest of the class.

Environmental Factors	Information	Tools/Resources	Incentives
	<ul style="list-style-type: none"> Does the individual know what is expected of them? Does the individual know how well they are performing? Is the individual given guidance about their performance? 	<ul style="list-style-type: none"> Does the person have the right tools for performance? Are tools and resources designed to match the human factors of performance? 	<ul style="list-style-type: none"> Are monetary and non-monetary incentives available? Are career development opportunities available? Are you providing the right motivation strategies to the person?
Individual Factors	Knowledge	Capacity	Motives
	<p>Does the individual have the knowledge and skills to perform as expected?</p> <p>Is well-designed training that matches requirements of performance available?</p>	<p>Is performance scheduled for times when people are at their best?</p> <p>Do people literally have the aptitude and physical ability to perform the job?</p>	<p>Has motivation been assessed?</p> <p>Is the person willing but not able?</p> <p>Is the person able but not willing?</p> <p>Are people recruited to match the realities of the job?</p>

Ask:

- What comments do you have about using the root cause analysis tool?
- How does root cause analysis relate to agent coaching?
- How can you leverage problem-solving with coaching agents?

9. Summary – 30 minutes

Say:

One of the critical components of problem-solving and root cause analysis is that some of the solutions to the root causes might require agent coaching.

Also, you might need to talk to the agent to gather some of the information to better understand the root cause – such as in terms of *does the agent have the knowledge and skills to do the job*. You may need to talk to the agent to find out if, in fact, they know how to use certain tools, such as Franklin, in context with their jobs to help customers.

Facilitator Note:

Find out what questions, if any, participants have, and conclude the module. Transition to De-escalation.

Facilitator Notes

