

# INTEGRATED TALENT MANAGEMENT

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AWARD NOMINATION  
SUPPLEMENT



2016 ATD EXCELLENCE IN PRACTICE



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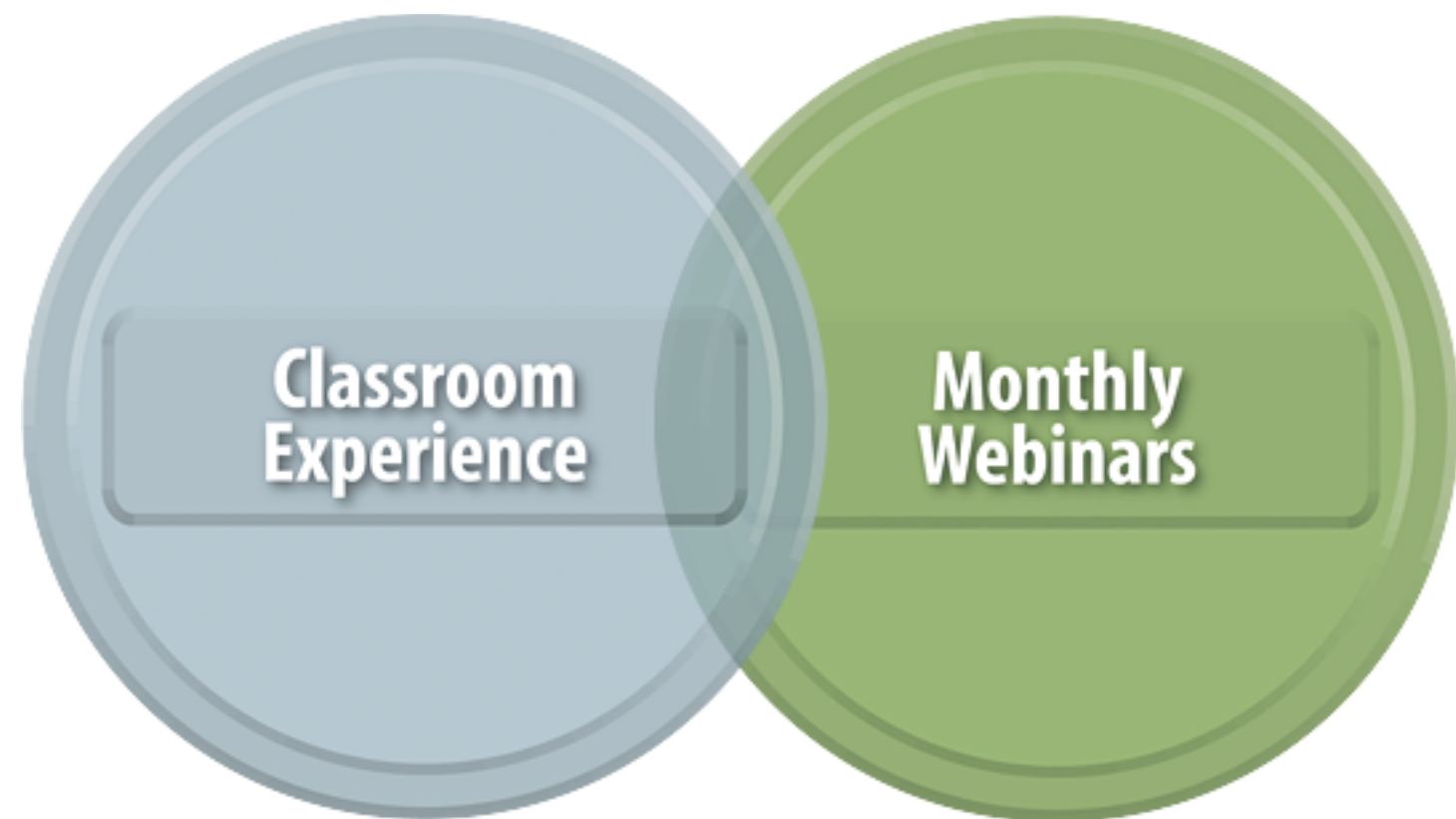


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## OVERVIEW

The practice has two main components: 1) a classroom experience that is a hybrid of Instructor Led Training (ILT), Computer Based Training (CBT), and interactive gamification; and 2) a six-month series of webinars designed to deepen retention and build a peer-group community.



## Tools, Metrics + Resources

- Abandon Rate
- ASA
- AHT
- QA
- C-STAT
- Attendance
- Adherence
- ACW
- SL

## Personality + EQ

- 80/40  
% - seconds
- 4 styles/types → 1 is dominant in ea. of us.
- Eagle
  - Dove
  - Peacock

## Agent Coaching

- Interactive
- Positive
- A plan

See it,  
Say it!!

Continue  
START  
STOP

- Ask the Agent to identify their behavior
- How did call go?  
↳ How do you know?
  - What went well?  
↳ How do you know?
  - What could have been better?  
↳ How do you know?
  - Here's what we've heard



## Monday

### Supervisor Roles

- Trad. vs CCC
- old roles to actual role
- Focus on cust. not prod.
- Continuous empl. training
- Attitude adjustment

### Time Management

- Urgent vs important
- Prioritize differently

## Tuesday

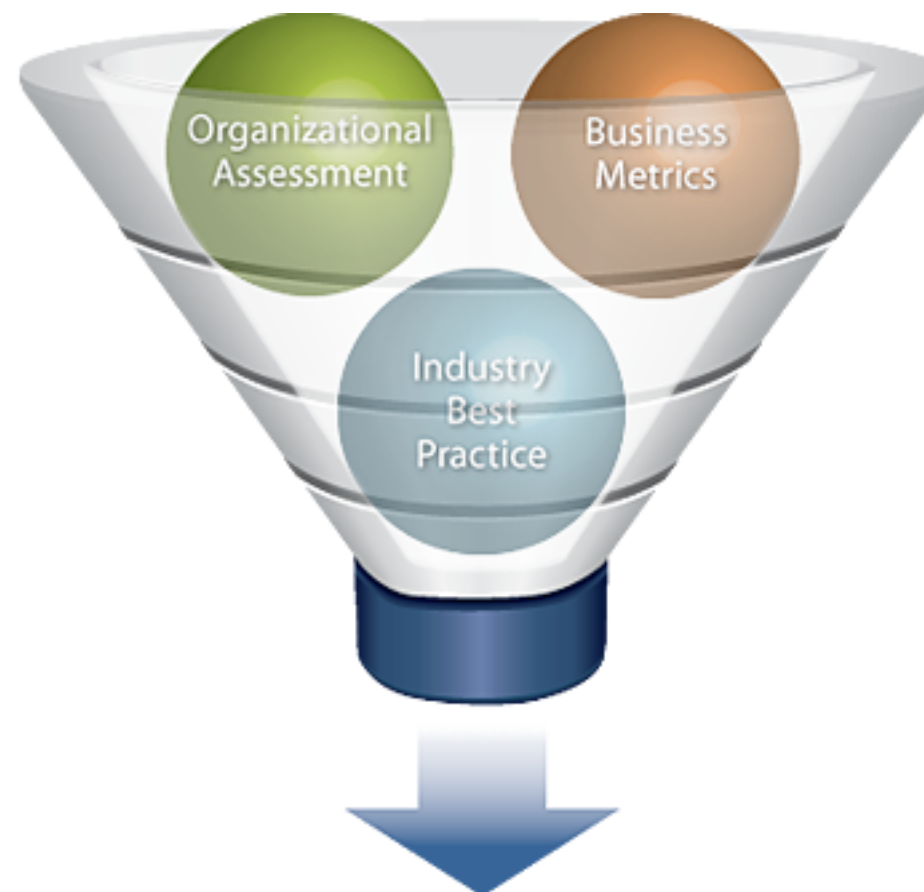
- Agent coaching
- Tools, Resources and Metrics
- Personality Styles and EQ

- Continue, start, stop
- See it, say it - positive



## NEEDS IDENTIFICATION

The practice was initiated to fill a gap in existing curriculum. However, as the result of a separate organizational assessment, it became clear that the practice could – if done right – drive needed change enterprise-wide and improve business metrics. With this compelling rationale, we halted development and returned to the drawing board with more strategic objectives based on the organizational assessment. The result was a complete overhaul of the theory-based leadership training event to a multi-dimensional curriculum designed to fundamentally reskill the supervisor corps.



A business-driven curriculum designed to address the real needs of real people

## CORPORATE STRATEGIC GOALS FROM 2014 ANNUAL REPORT

	GOAL 1	GOAL 2	GOAL 3	GOAL 4
	High-Quality Services	Provide Excellent Customer Experiences	Sustain Controllable Income	Ensure Safe Workplace and Engage Workforce
Supervisor Curriculum	<p>1) Improves agent performance by improving the quality of coaching by supervisors</p> <p>2) Educates supervisors as to the metrics that drive business</p> <p>3) Identifies and practices behavioral shifts that will help supervisors to be more effective and confident in their role</p>	<p>As the face of our organization to customers, agent effectiveness is essential. The Supervisor Curriculum is designed around the idea that better coaching by supervisors will improve agent performance and, as a natural result, customer experience</p>	<p>Emphasizes business metrics so learners gain awareness of how low morale contributes to absenteeism and other performance indicators. Using the program's "Six Step Coaching Formula," supervisors increase agents' ability to resolve customer issues in one call, reducing call volume and operating costs</p>	<p>Provides supervisors with tools and techniques for de-escalating angry callers...and angry employees. Further, the curriculum emphasizes self-awareness and awareness of interpersonal styles as tools for building bridges with agents.</p>



## DESIGN APPROACH

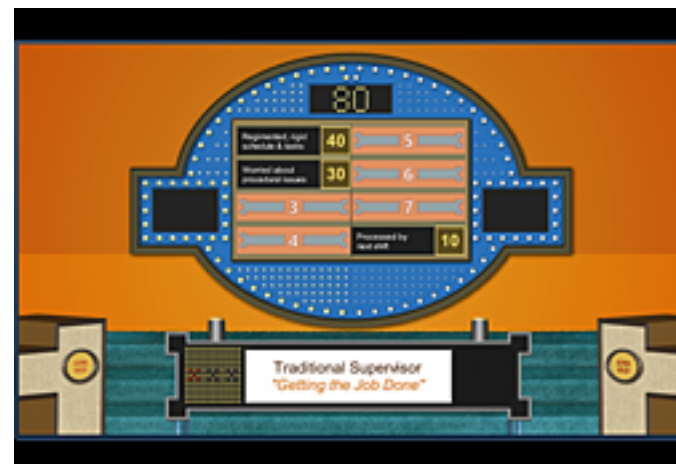
Two ideas became the bridge between needs identification and design. The first was that the role of call center supervisor in our particular organization comes down to “the what” and “the how” of the job: specific tasks to be accomplished (what) and managing personal impact on agents while doing those tasks (how). The second idea was that it should be easier for supervisors to coach agents than not to coach them. Meaning, we should connect the dots between coaching and 1) business impact (metrics) and 2) quality of daily life for the supervisor (more skilled agents equates to fewer calls escalated to supervisors, lower call volume, etc.) in such a compelling manner that coaching will be the obvious best answer.





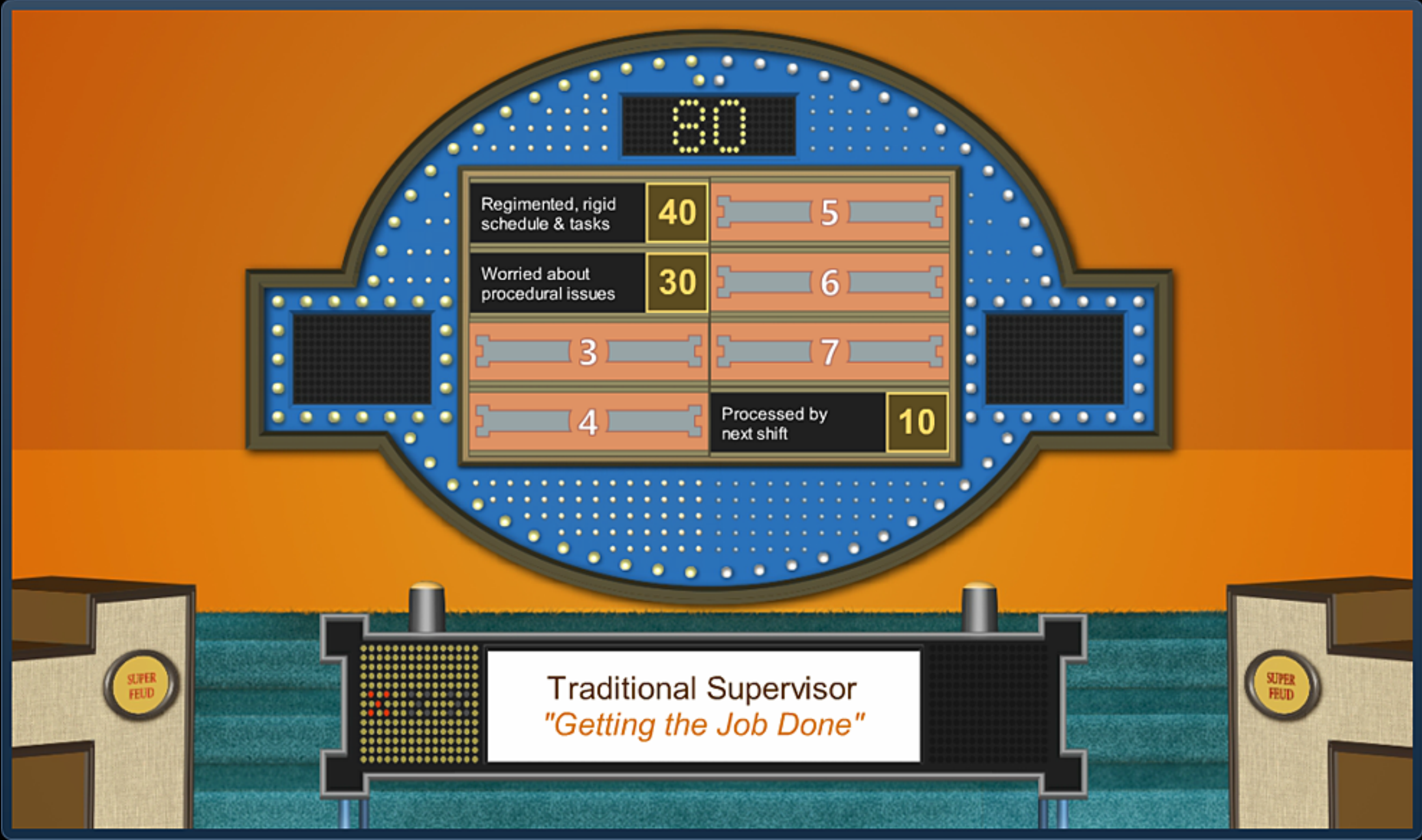
## GAMIFICATION

The concept of gamification is to introduce game elements to a nongame situation, and can transform a “death by Power Point” classroom experience into a highly engaging, interactive one in which learning occurs during game play. Replacing pages of content with a familiar game the learner may have played during his or her youth not only brings back nostalgic feelings, but allows the learner to scaffold their expertise in any given area through levels, badge rewards, and scores. Having previous mastery of and familiarity with a board game, game show or card game allows the learner to have more confidence when progressing through new or difficult content because they already understand the end goal and how to achieve it...independent of the subject matter.



[Click to view larger images.](#)





Screen shot of "Super Feud" shown above. [Click here to view video.](#)



### The Role Reversal Game

Who is the Customer Care Center here to support?  
**(Drag and Drop 1 stone)**

Previous1 of 5Next

Operations Manager

Site Manager

Human Resources

Ops Support Manager

Trainers

Quality Analysts

Customers

Supervisors

Agents

HQ

Command Center

Drag and Drop each stone to the correct position on the game board.

Screen shot of "The Role Reversal Game" shown above. [Click here to view video.](#)



## SUPERVISOR SOLITAIRE ACTIVITY

**Click to  
Select Question**



Q4



### Q3



Q1



Q2



An agent approaches you and expresses concerns about the number of emergency exits in the call center. They tell you they are planning on filing a report that in their opinion the number is insufficient for the number of agents employed at the center.

## PREVIOUS

## MATRIX

**NEXT**

Screen shot of "Supervisor Solitaire Activity" shown above. [Click here to view video.](#)





Screen shot of "Personality Types" shown above. [Click here to view video.](#)

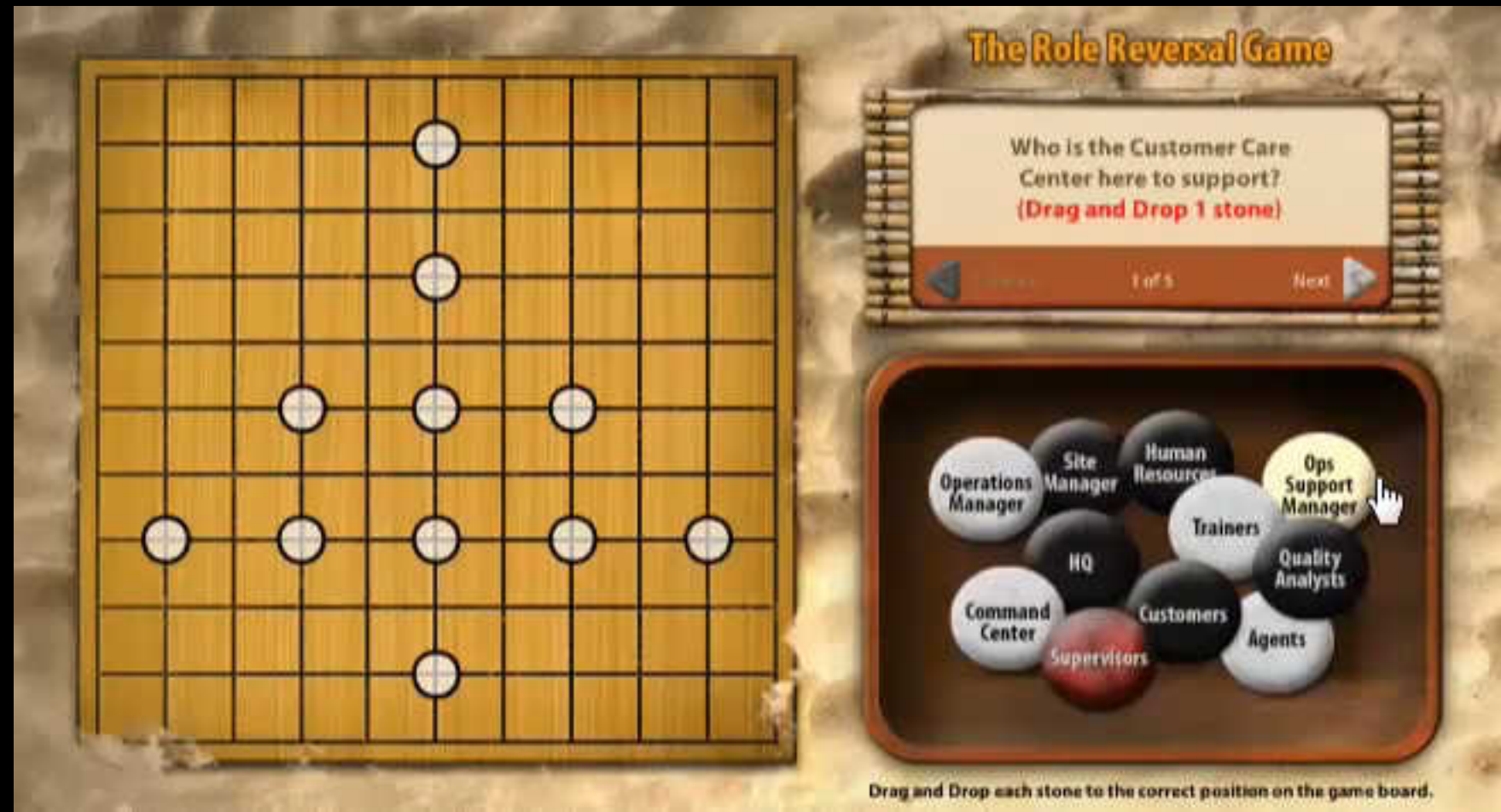


**GAMIFICATION:** Supervisor Training \ Supervisor Role

*Click image to pause video*

In this activity, learners work in teams to come up with answers to two questions: "What are the characteristics of a traditional supervisor role?" and "What are the characteristics of a call center supervisor role?" Using tip sheets with a combination of correct and incorrect responses, the teams compete for the chance to answer the questions correctly, yielding their turn to the opposing team when they respond incorrectly. The combination of time pressure and competition creates a high energy experience in which team members discuss and debate their options before selecting their responses. The game is followed by a robust class discussion of the correct responses that goes beyond rote memorization to deep understanding based on moderated debate.

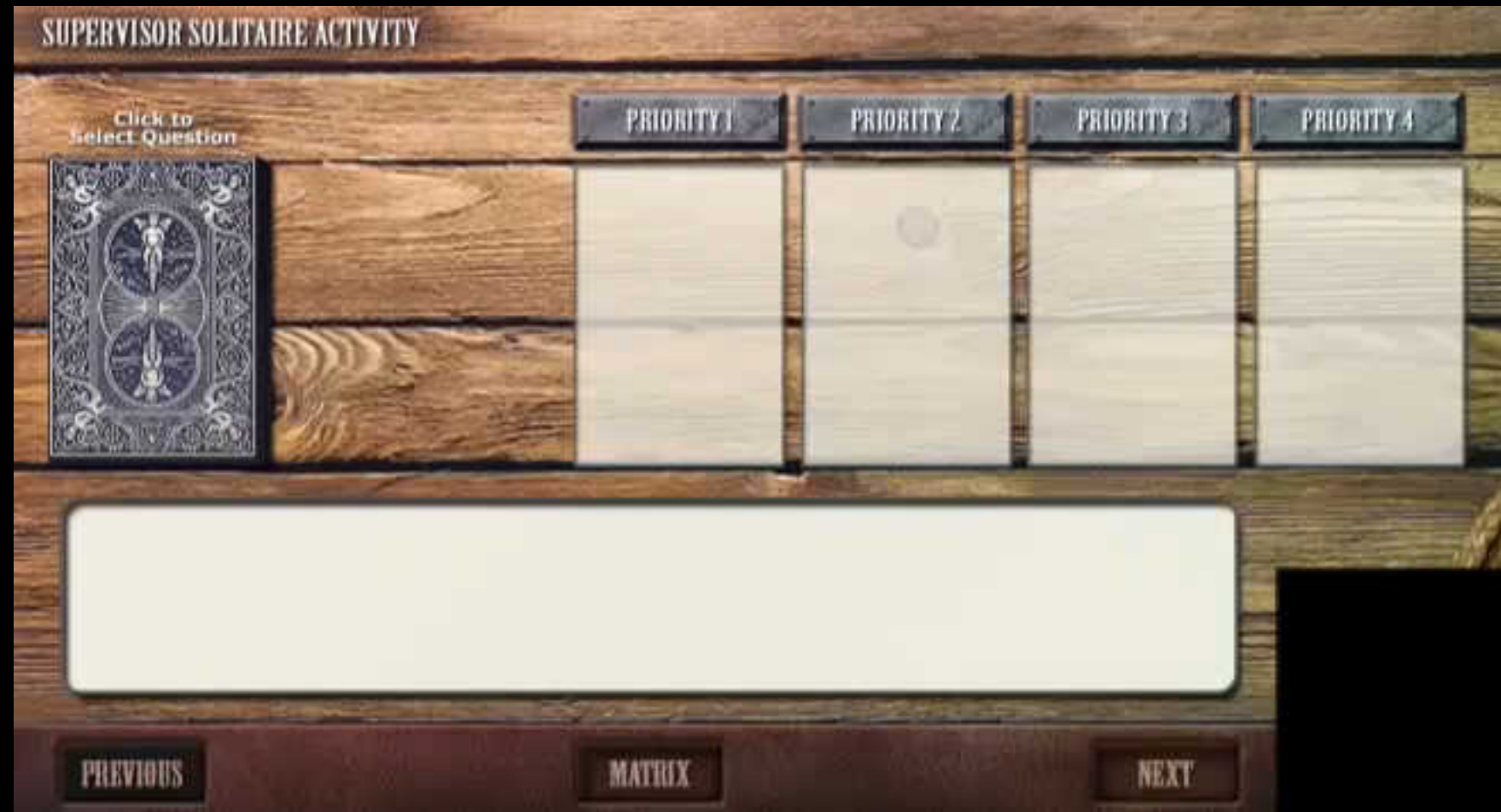


**GAMIFICATION:** Supervisor Training \ Supervisor Role

*Click image to pause video*

"The Role Reversal Game" is based off the ancient Chinese board game "Go". When developing the idea behind this activity it was not to replicate the game, but the concept and layout. In the original game of "Go" the player needed to place as many of their game pieces around their opponent on the board to win. In The Role Reversal Game the concept is to place the order of roles in a customer care center according to their importance. Even if the user has never seen, nor played the original game, a feeling of familiarity in the user is evoked with less feelings of trepidation to the content.



**GAMIFICATION:** Supervisor Training \ Time Allocation

*Click image to pause video*

Like the well-known card game, “Supervisor Solitaire Activity” was originally created as a paper-based activity. The student would read the question and place it in a pile from 1 to 4 according to its priority. Seeing that the activity would require paper cards for every training course and location, our development team designed a game where the user could read a question, drag and drop a card onto a priority pile and quickly receive feedback while still having a class discussion. The activity became more engaging and interactive than the original concept of paper-based, thus proved to be a valuable tool in e-Learning.

**GAMIFICATION:** Supervisor Training \ Personality & Emotional Intelligence

*Click image to pause video*

“Personality Types” located under Personality and Emotional Intelligence designed after a childhood favorite where the player mimic’s audio sequences demonstrated by the game. Not only did the layout and concept of this game quickly become evident when brainstorming gamification for this activity, but allowed for quick and efficient development of the game because of the familiar gaming concept. Users enjoyed interacting with the game where they self-identified with numerous personality types. Had this activity only been a match game or list, the user would be less engaged with a potential degradation of retention and comprehension of the subject matter.



## EVALUATION STRATEGY

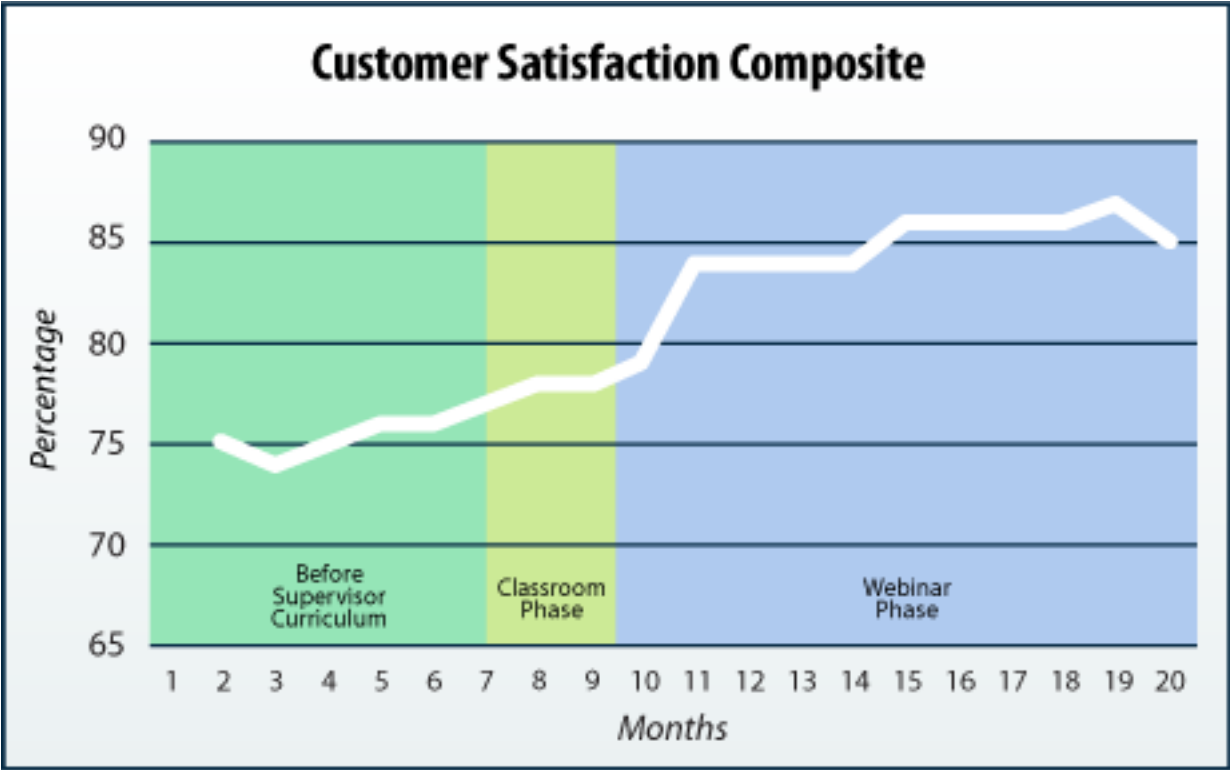
Our selected evaluation strategy employs Kirkpatrick's Methodology because this model is suited for measuring Return on Expectation (ROE). We felt it would ensure visibility into the true impact of our solution. The model has four stages: 1) Evaluation Planning, 2) Data Collection, 3) Data Analysis, and 4) Reporting. This table details phase 2 and depicts what data was collected, how it is collected and frequency in which it will be collected.

Data Collected	How Data is Collected	Evaluation Frequency
Reaction and Planned Action	Survey (paper)	End of days 1-3
Perceived Learning	Self-assessment (paper)	End of day 5
Application of knowledge, skills, and abilities relating to problem solving, coaching, labor relations, prioritization, and emotional intelligence	Survey (electronic-survey monkey)	30, 90 and 180 days post training
Change in team scorecard (AHT, Adherence, Quality)	Supervisor scorecard operations report	30, 60, 90, and 180 days post training
Change in time supervisors spent coaching agents	Operations report	Monthly
Change in Attendance, and CSAT (customer satisfaction)	Monthly operations reports	Monthly
Decrease in agent transfers to supervisors	Survey/focus groups	Monthly
Change in employee engagement	Survey (electronic)	Bi-annually? Annually?



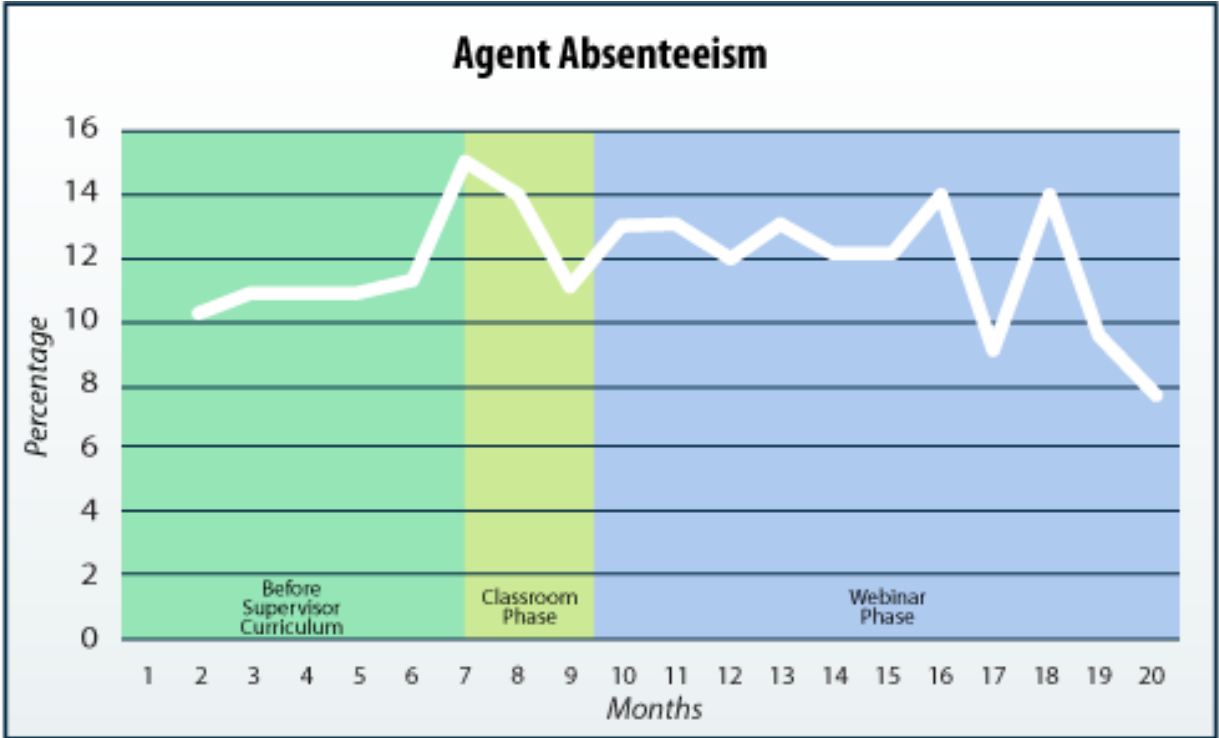
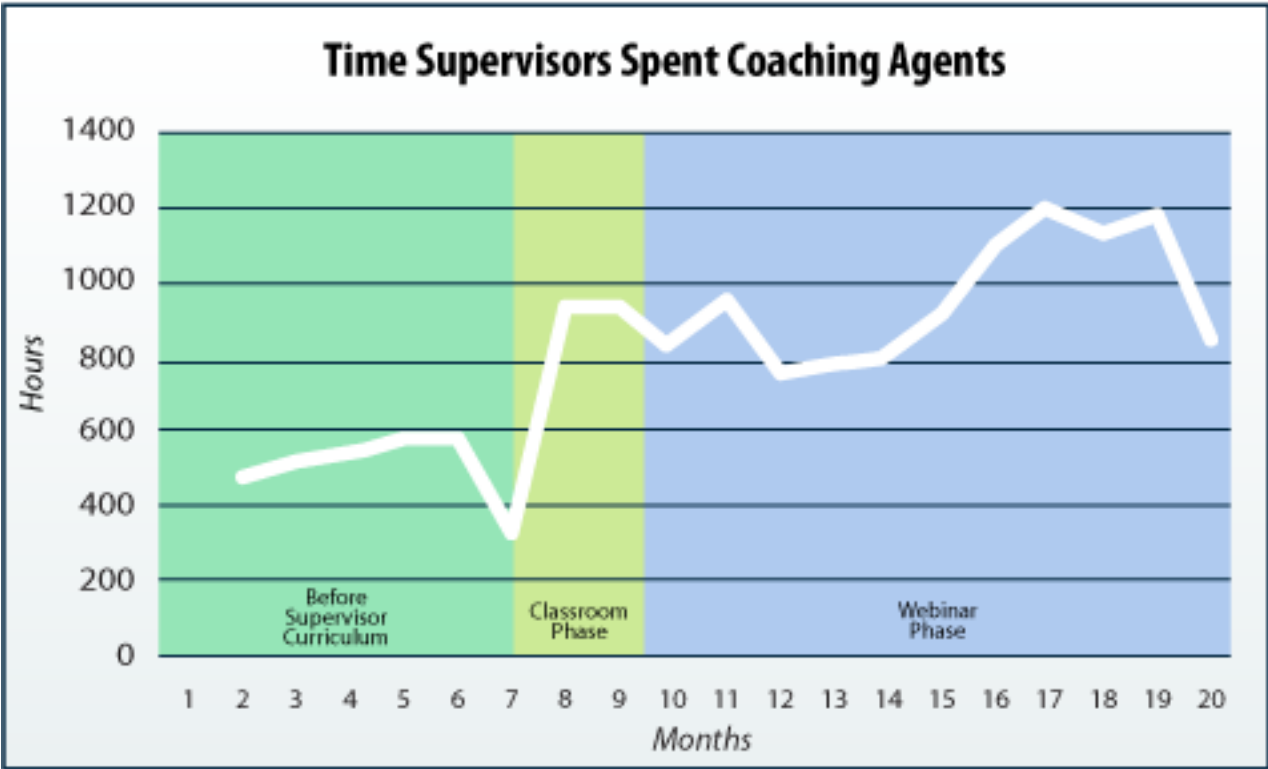
RESULTS: BEFORE & AFTER

As a result of applying knowledge, skills and abilities from the practice implementation, there has been an increase in several key business drivers. Absenteeism, while not immediately improved is currently trending down. However, the Customer Satisfaction Composite, agent coaching hours and Quality Assurance scores have all spiked upward since the practice was implemented.





RESULTS: BEFORE & AFTER (CONTINUED)





	Instructions: Please rate the following items in terms of "Knowledge of or confidence in my ability to..."	5 pt Rating Scale 1 = Disagree 5 = Agree		
		AVERAGE		CHANGE
Q#	Item	Before	After	
				2.36
18	Coach agents using the 6-step coaching formula	2.32	4.68	2.36
19	Create a targeted Continue, Start, and Stop coaching plan with agents	2.48	4.67	2.19
14	Use the Root Cause Matrix tool to identify causes for agent performance problems	2.98	4.49	1.51
3	Focus efforts on the customer experience versus headquarter's expectations	3.12	4.59	1.47
2	How my role fits into the big picture of the ECC	3.44	4.72	1.28
15	Coach agents to de-escalate frustrated customers	3.26	4.54	1.28
11	Manage my emotions and instinctive reactions	3.43	4.63	1.2
17	Improve agent performance through effective coaching	3.6	4.8	1.2
4	Align work activity with performance metrics	3.4	4.56	1.16
16	Apply active listening skills by clarifying, paraphrasing, and summarizing key points in communication interactions	3.54	4.7	1.16
5	Use performance metrics as a tool (Avg. QA score, Avg # of calls taken, # of Transfers, AHT, Attendance, and Adherence) to guide agent coaching efforts	3.57	4.69	1.12
13	Manage relationships	3.53	4.65	1.12
9	Adapt how I approach others based on personality style differences	3.63	4.74	1.11
1	Expectations for my role as a customer contact center supervisor	3.62	4.68	1.06
12	Be socially aware of others around me	3.58	4.63	1.05
6	Work smarter by managing time and prioritizing activities	3.47	4.49	1.02
10	Be self-aware	3.71	4.72	1.01
7	Manage daily activities to allow for agent coaching	3.58	4.56	0.98
8	Manage stress	3.33	4.28	0.95



## PARTICIPANT QUOTES ON DAY 5

“I got more insight with the personality and EQ and it has made me more aware of how I will be impacting and observing my team. I will be more effective with this training.”

“I need to be aware of how I come across when I’m focused, and manage that.”

“The coaching tools will make it more positive...and I will not dread doing it as much.”

“I learned I wasn’t coming across the way I meant to and it was harsh for the agents.”

“I like the ‘and-not-but’ approach because when an agent hears you say ‘but’ they wait for the other shoe to drop. I can see now how saying ‘you need to’ triggers agents to be defensive to coaching.”



## COMMENTS FROM POST-TRAINING COHORT CALL

COACHING

*“The 6-Step Coaching Formula saves time because it isn’t so combative. The focus is on what the agent hears on the call and not on me telling them they did it wrong. They hear it for themselves instead.”*

*“My agents aren’t shutting down in coaching now, they are more open because it is actual coaching not punishment. We didn’t mean to berate them before but the QA score was driving it. Now we focus on the positive, “here’s what you did really well, and here’s what you can improve,” rather than “this is what you need to do. Agents are responding to it.”*

*“I realized that we want the agents to have a smile on their face when they talk to the customer...we need to have the same smile when we talk to the agents.”*

*“I have an agent who talks very monotone and I’ve told him over and over but nothing changes. When I asked him to tell me what he was hearing on his call rather than just telling him, he pointed it out!”*



## COMMENTS FROM POST-TRAINING COHORT CALL

EMOTIONAL INTELLIGENCE

*"I've had a breakthrough with one of my agents who always puts me on edge, she's frustrating. After class I tried a different approach; I stepped back and asked her to talk instead of reacting to her defensiveness...I took her reaction out of my reaction and now we have more conversation and it's working better. I talk to her differently now and she's noticed, and now she is coming around."*

*"I noticed when I'm stressed I stay behind my desk, and my agents see that, because normally I'm all over the place. So I need to reassure them everything is okay."*

*"I notice that when agents see me coming they look around to see what they did wrong. Now I "touch" every agent and play around, like I might move someone's pen to the left side of their desk just to show they don't worry when they see me coming."*

*"The peer feedback I got in class really helped me out – now I am trying not to sound robotic when I'm in a hurry."*



**SUPERVISOR COMMENTS 30-DAYS POST TRAINING**

*Agents are talking more in coaching; 90% agent talking, 10% me. One of the most stubborn agents who doesn't care about dead air, etc., today she's identifying dead air and opportunities. Allowing my employees to talk more and understand more; their [QA] scores are increasing.*

*Agents appreciate business metrics more, and see the impact of their after-call work as definitely beneficial; agents now can quote the stats to me and seem to be enjoying it so far.*

*Majority of agents are more in tuned with how they can do things better and how behavior impacts specific metrics; they were so used to us pulling up the information, now they are pointing things out. The way the questions are worded makes them think harder. That's how majority of my agents have responded to it.*

*We reference EQ at least daily now. It's helping us to be more aware. After we've figured out our personality types, we are working to work better with different agents. We are more aware of our impact versus intent.*

**SITE MANAGER COMMENTS 30-DAYS POST TRAINING**

*Everyone has taken hold of the training and are using it which is the best thing that could happen, they continue to use what they learned in training; definitely positive things that were being done.*

*It's been very positive; QA has always been a focus; this training went hand-in hand with what we are already doing and has enhanced our skillsets. Look forward to seeing more meetings like this for developing our supervisors.*



**SUPERVISOR COMMENTS 60-DAYS POST TRAINING**

Agents like the customer-first piece of it, focusing on behaviors that will make a quality experience for the customer; one agent brought up what could've shaved 30 seconds off a call and she is now really beginning to think about AHT [Average Handle Time] and how customers want quick service. She's focused on how what she does impacts the customer versus QA [Quality Assessment] points she's missed.

Agents are more focused on totality of the call, the big picture of the customer experience rather than QA point evaluation.

Quality scores are improving.

Agents are taking more accountability and feeling more confident; not flagging as much or escalating calls to supervisors as much.

During the coaching sessions, agents go through and analyze the calls and take accountability, discussing what they want to do next time, etc. and more prepared to see how they will handle the next call better.

The new procedure is great as it connects the dots for the agent; a better connection to the job they do and the emotional part, in terms of how to improve quality; the connection between supervisors and agents is becoming stronger in how to be professional and use [proprietary resources] more.

## KNOWLEDGE SHARING & LESSONS LEARNED

We improved the Supervisor Curriculum as a result of the important learnings that came out of the pilot.

	LEARNED	CHANGED	RESULT
1	The focus of coaching to an agent's Quality Assessment (QA) score created a negative dynamic from the first moment of the coaching session; agents were defensive and supervisors critical	The focus of the coaching to a dialogue about the behaviors that did and didn't work, and possible solutions; reviewing the QA at the end of the session almost as an afterthought	More positive interaction between supervisors and agents, less dread and avoidance of coaching on the part of supervisors; more time spent in coaching activity
2	Debrief of trio role-plays should include feedback from the person playing "agent" role	Instructor guidelines for debriefing role-plays; specifically, after hearing from the "supervisor" and "observer," asking the "agent" how it felt to be coached in this new way	Empathy for the agent and compelling, public validation for the new coaching process
3	Supervisors already know a lot about how to de-escalate upset customers	De-escalation content to include tips and tools for coaching their agents to de-escalate	Higher level of engagement and favorability among participants
4	Each call center responded differently to the training content	Facilitator guide make room for regional idiosyncrasies that may emerge	Better prepared facilitators and more flexible training design
5	The SME-led Labor Relations module was dense, generic and slide-driven	Modified the previous day to allow time for supervisors to generate their own questions	More engaging delivery of dense content; greater relevance to our audience