CAN YOU HEAR ME NOW?
A Call Center Performance Analysis

INTRODUCTION

Team X is one of 15 teams in a call center based in the Philippines providing 411 services to cellular company subscribers in the US. Each team consists of 25 Customer Service Representatives (CSR) and a Team Manager (TM). The team's performance is graded quarterly by measuring their Excellence Rating (ER):

ER = Attendance (40%) + Quality Assurance (QA) score (40%) + CSR Excellence Report (20%).   A typical ER for a team is at least 90%.

Team X's ER score has consistently been on the 85 - 90% range. Team Manager attributes this to their work shift which is from 10:30 p.m. to 5:30 a.m. Manila Time (2:30 p.m. to 10:30 pm PST) – the least favorite shift.   Attendance and tardiness has always been a problem and their shift also gets the new CSR recruits. Team Manager would like to improve their ER score despite their attendance problems. He believes that by honing the skills of his CSR, the team will be able to achieve an above 90% score on their ER.

This report will focus mainly on the QA and Excellence Reports of the CSR and will identify any opportunities for improvement. It will examine and analyze any obstacles to this improvements and propose solution systems and job aids that may be applied by the team.

SOURCES OF ANALYSIS INFORMATION AND DESCRIPTION OF TARGET AUDIENCE

I have identified the following people as the main sources of analysis information and also the ones with the most to gain from an improved ER score:

Customer Service Representatives   -- CSR are trained for 5 weeks on accent neutralization, US geography, grammar, common slang words, most commonly requested listings and memorizing call protocols (see Appendix). Their final week is an on-the-job training where they are allowed to answer "live" calls while being supervised. During this period, they are encouraged to use their "call protocol manual" – a notebook containing a list of call scripts for every call situation (See Appendix A).

Team Manager -- TM supervises the CSR and assists them in calls they cannot handle such as calls from irate, incoherent and/or drunk customers. They provide instant feedback on unsuccessful calls and provide on the spot coaching. They also issue verbal and written warnings on tardiness and absenteeism which are submitted to QA Department weekly.

QA Department – QA Director assigns performance goals every quarter to the teams. A QA Monitor (QM) conducts weekly random call monitoring (minimum of 7, maximum of 15) of each CSR and issues report cards containing the following:

1. **QA Scores** – computed by getting the percentage of unsuccessful calls over successful calls. Calls are rated as "unsuccessful" if the CSR failed to provide the correct information to customer and/or did not follow the correct call protocol.

2. **Excellence Report** --   Issued if the QA Monitor feels that the CSR provided excellent call service. The CSR gets 25 bonus points for every excellence report received with a maximum bonus of 100 points.

3. **Call Processing Time (CPT)** – the amount of time (in seconds) it takes to successfully manage a customer's call. Calls are measured from the time the CSR picks up the call to the time the customer hangs up.

DEFINING THE GAP: OPTIMALS MINUS ACTUALS

I conducted interviews and surveys using questionnaires with the Team Manager, QA Director, QA Monitor and CSR for Team X. The following is a summary of the results:

OPTIMALS	ACTUALS
All CSR must successfully manage a call using the correct call protocol without having to look at the manual or protocol list notebook	Out of 25 CSR: • 12 use the manual or protocol list notebook 100% of the time when answering calls • 5 use the manual or protocol list notebook 80% of the time • 8 use the manual or protocol list notebook but improvises and revises the script
All CSR must have an average call processing time (CPT) of 35 seconds or less	Out of 25 CSR: • 9 have an average CPT of 35 seconds • 3 have an average of 29 seconds • 11 have an average of 45 seconds • 2 have an average of 43 seconds
All CSR must receive at least one Excellence Report (provided excellent call service as graded by QA Monitor) a week	Out of 25 CSR: • 15 have not received any excellence report in their report card • 1 has 2 excellence reports • 9 have 1 excellence report each
Team must have an attendance rate of at least 97%	The team has an attendance rate of 90%

The questionnaire also showed the following:

1. The average call processing time of those who used the manual 80 - 100% of the time is 40 seconds.
2. Eleven out of 25 CSR have been with the company for 3 months or less.
3. Two new enhanced services were added during the last month: Movie Times and Driving Directions.
4. Team X time shift receives the most volume of calls of all teams.

ATTRIBUTING CAUSES AND CRAFTING RECOMMENDATIONS

Opportunity for Improvement: Constant use of call protocol manual when taking calls as opposed to not using the manual
Driver: Motivation
Evidence: More than half of the CSR surveyed referred to the call protocol manual 80 – 100% of the time to answer calls. This shows no motivation on the part of the CSR to do away with it because there are no restrictions in place for its use The survey showed that using the manual constantly affects the CPT score of the CSR.
Recommended solutions:

a. Put a time frame on how long a CSR can use the call protocol manual during calls. Allowing them to use it only during the on-the-job training will motivate them to memorize or get used to the script. This will eliminate the process of paging through a manual that adds seconds to their CPT score.

b. For the new recruits, create a job aid that can replace the call protocol manual. The job aid can be a checklist, flip chart or reminder points which can be used only when necessary.

Opportunity for Improvement: Improving Call Processing Time score
Driver: Skill
Evidence: Thirteen out of 25 CSR has an average CPT score of at least 43 seconds. Of the 13, eleven has been with the company less than 3 months. They have not had enough practice with the procedure and being assigned to a time shift that has the most volume of calls is not helping.
Recommended solutions:

a. Provide additional on-the-job training time. This can be done by assigning the new CSR to a low volume time shift so they can get more practice and more comfortable before being subjected to high volume calls. The training can also include the use of the job aid mentioned above that will replace the manual.

Opportunity for Improvement: Improving monitored call performance to receive Excellence Reports
Driver: Incentive
Evidence: The only form of feedback the CSR receives is from the Team Manager when they assist during difficult calls. This does not provide enough reinforcement of their training nor does it provide full assessment of how they are doing with their jobs. The report card from the QA department shows only the grades and the number of failed monitored calls. There is no incentive for the CSR to improve.
Recommended solutions:

a. Provide feedbacks in the report card. This feedback can be in the form of an explanation of the failed calls and why they failed. Additional information such as recommendations or pointers on what to do in the future in cases of calls like the failed ones will provide the incentive for the CSR to improve.

b. A job aid in the form of a self-assessment can also be helpful. It can be in the form of a questionnaire that is given by Team Manager to the CSR every week allowing them to grade themselves.

CONCLUSION: ROLE FOR JOB AIDS

A more in-depth analysis of other areas such as attendance and CSR training will provide a clearer picture of other opportunities for improvement for any team in the company. The recommendations offered in this report aim to provide it on a Team Manager and QA Department level. The job aids recommended are simple and cost-effective and can be implemented and tested in the immediate time frame to provide the desired results.

Driving Directions Protocol

Caller asking for directions

CSR: *Are you driving?*

If answer is "YES"

CSR: *For safety reasons, Please pull over while I assist you with directions*

If caller says they cannot because they are on a highway

CSR: *Please try to find a place where you can safely pull over*

Don't insist or argue with caller if they do not want to pull over…

Then open the Directions box (computer)

Fill the FROM part. (computer)

You can use these protocols:
May I have your present location?
Where will you be coming from?
Where are you at this moment, so I can locate a starting point?
Would that be a street, avenue, boulevard.
How are you spelling the street/city?

If the caller doesn't know where he is:
Can you continue driving until you see an address, street sign, or intersection? When you find one, please read the street name to me and I will use it as our starting point.

If the caller is in a highway and doesn't know what city he is in:
Do you remember the last city or exit you passed?

If the caller can't remember either.
Can you continue driving until you see the next exit, then tell me what that is and I will use it as a starting point?

After that fill the TO: part (computer)
Where will you be going?
Do you have the address of the location you are trying to go to?
Can I have the address you will be going to?

After that, read the narrative…

Movie Times Protocol

If the caller is asking for a movie cinema:

I have the "Movie cinema" on "Street", and we also offer movie times and listings, what movie would you like to see?

Introduction

Team Orange is one of 15 teams in a call center in the Philippines providing 411 services to cellular phone company subscribers in the United States (US). It consists of a Team Manager (TM) and 25 Customer Service Representatives (CSR). Most of the CSR are new recruits, fresh from their 5-week training which included 4 weeks of classroom-setting lecture and one week of call simulation practice or role playing.   Every quarter, the team's performance or Excellence Rating (ER) is graded based on the following:

- **Call Processing Time (CPT)** - the amount of time it takes for a CSR to successfully manage a call from the time it is picked up to the time the customer hangs up. CSR use call scripts to handle calls. A collection of these call scripts for every call situation is called the "call protocol manual" and is part of the training manual provided by the training staff. When new services are added, photocopies of new call scripts are handed to the CSR.
- **Quality Assurance (QA) Score** - the ratio of unsuccessful calls versus successful calls. A call is deemed successful when the correct information is provided to the caller and the correct call protocol was used.
- **CSR Excellence Report** – bonus points given by QA Monitor to CSR who provided excellent service. These are noted on the CSR report card.
- **Attendance**

The typical ER score for a team is at least 90%. Team Orange has consistently scored below 90% and the TM would like to see this improved.

Analysis

After conducting surveys, reviewing documents and interviewing the training staff, Team Manager, QA Mentor and CSR, the performance analysis revealed competency issues on several areas, two of which could be improved by job aids and help the team improve:

1. Simplify the call protocol scripts into easier-to-use guides. The call protocol script is a document included in the training manual which contains text (a script) for use during different call situations. When the company offers new services, copies of new scripts are distributed by the training department. The CSR relied heavily on these scripts, reading them word for word during call handling, sounding too forced and not focused on the customer. This caused their call processing time to suffer and a few customers dissatisfied. A call guide showing the flow of call and some visual cues instead of a series of text will encourage the CSR to structure their own call script, adapt their style to the needs of the customer and focus on providing excellent service.

2. <u>Create a Performance Grading Sheet</u> that will provide an evaluation of how the CSR performed and will specifically identify skills that need improvement. The trainees were evaluated on their 4-week lecture with a graded final exam. However, minimal attention was given to customer care delivery skills and no other evaluation was provided except on-the-spot corrections by the trainers during role playing. In order to provide excellent customer service, the training must include multiple opportunities for skills improvement and development. Ideally, this can be achieved by redesigning the larger picture of training curriculum but providing a measurement of performance or feedback will assist both the trainers (and later on the Team Manager) and the trainees (CSR) to work on the specific areas that need more coaching and practice. The Performance Grading Sheet contains a checklist of company standard call performance behaviors.

Objectives

Given a job aid, the trainer will be able to accurately provide a valid measurement of the performance of a CSR and list pointers and recommendations on customer skill areas that need further improvement.

Given a call guide, the customer service representative will be able to confidently handle a call without reading a call script and accurately provide the required information to the customer in 35 seconds or less.

Pilot Test

The pilot test was conducted during a 3-week period. Three trainers, 10 new trainees chosen randomly and 10 of the newest CSR with the worst CPT score and lowest QA rating from Team Orange were selected.

Trainers used the Performance Grading Sheet (see Appendix A) to evaluate and measure the performance of the 10 trainees during the call simulation week. It is printed on an 8.5 x 11 sheet and incorporates a checklist of company standard call performance behaviors with strengths and weaknesses review.

Trainees used the call guide manual during role playing and during two weeks on the job. The CSR used them in place of the old manual. The call guide manual contains a Call Flowchart (see Appendix B) outlining the critical points of a successful call and the Call Guides. The guides used a combination of flowchart and decision table, with landscape layout and color-coded tabs all printed on cardboard type 8.5 x 11 size paper. They were distributed to the participants in a 3-ring binder that can be easily flipped over. At the end of the test period, the QA Monitor provided the report cards and participants were asked to complete a survey. The following is a summary of the findings:

1. Seven out of 10 trainees did not use the sample script listed on the Call Guide but used their own version. One out of ten CSR read the script verbatim. The rest used a variation of the scripts.

2. All twenty participants found the guides easy to read understand and follow.
3. Eighty percent (80%) of the participants considered their evaluation motivating and encouraging. Ninety percent (90%) felt confident that they have provided exceptional customer service.
4. The trainers and the Team Manager find the grading sheet very useful in pointing out errors made by the CSR and trainees and highlighting their strengths.

Report Card (QA Monitor)		
	Trainees (10)	**CSR (10)**
Call Processing Time (must be 35 seconds or less)	Worst time: 36 seconds Best time: 31 seconds	Worst time: 34 seconds Best time: 26 seconds
Excellence Reports (bonus points for excellent service)	5 trainees received 1 excellence report each	8 CSR received one excellence report each
QA Score (optimal 100%)	7 trainees received 97% 3 trainees received 100%	All 10 CSR received 100%

Pilot Test Interpretation and Revision

The report cards and additional findings indicated that the Call Guide encouraged the participants to structure their own script instead of reading word for word. Because they are not looking at a "text script", the tendency to rely on the printed word was less. The color-coded flowchart and added graphics triggered memory points and worked as visual cues which allowed them to improvise without deviating from the company call standards. The impressive numbers of excellence reports received by both trainees and CSR can be attributed to both job aids used together. The specific feedback on the performance grading sheet increased the confidence level of the participants.

No major revisions were made on the job aids after the pilot test except for creating additional Call Guides for other services. A smaller version of the guides is currently being considered for future training use.

Solution System

An ideal solution involves a training curriculum designed to emphasize customer relationship building more than knowledge-based training. Providing a learning structure that includes opportunities for development and practice of customer care will reduce the time it takes for the CSR to meet the standards set by the company. It will also shorten the period of "practicing with the customers". The job aids introduced here will help achieve some goals in the short term. Incorporating them into a new training curriculum will provide a more effective long term solution.

Appendix A: Job Aid for Performance Evaluation

<u>Call Performance Grading Sheet</u>

Customer Service Representative: _____

Training Date: _____   Trainer: _____

Grading: A = Excellent Work   B = Needs Improvement

PERFORMANCE	
	Greets customer (express willingness to help)
	Acknowledges customers request (restates requests)
	Asks relevant questions (Are you driving? Can you spell that for me, please?)
	Transfers calls (gain understanding of the issue, reviews queues)
	Places customer on hold (request permission, provides reason, thanks customer for holding upon return)
	Provides accurate and complete responses (educates customer)
	Verifies solutions (Have I answered all your questions?)
	Offers opportunity for additional questions
	Expresses customer's value (think of customer needs)
	CSR adaptability (assesses customer, modifies approach, uses "we" instead "you", minimize pauses, 'ums or ahs')
OTHER SKILLS ASSESSMENT	
	Demonstrated use of telephone
	Demonstrated use of PC

Strengths:

_____

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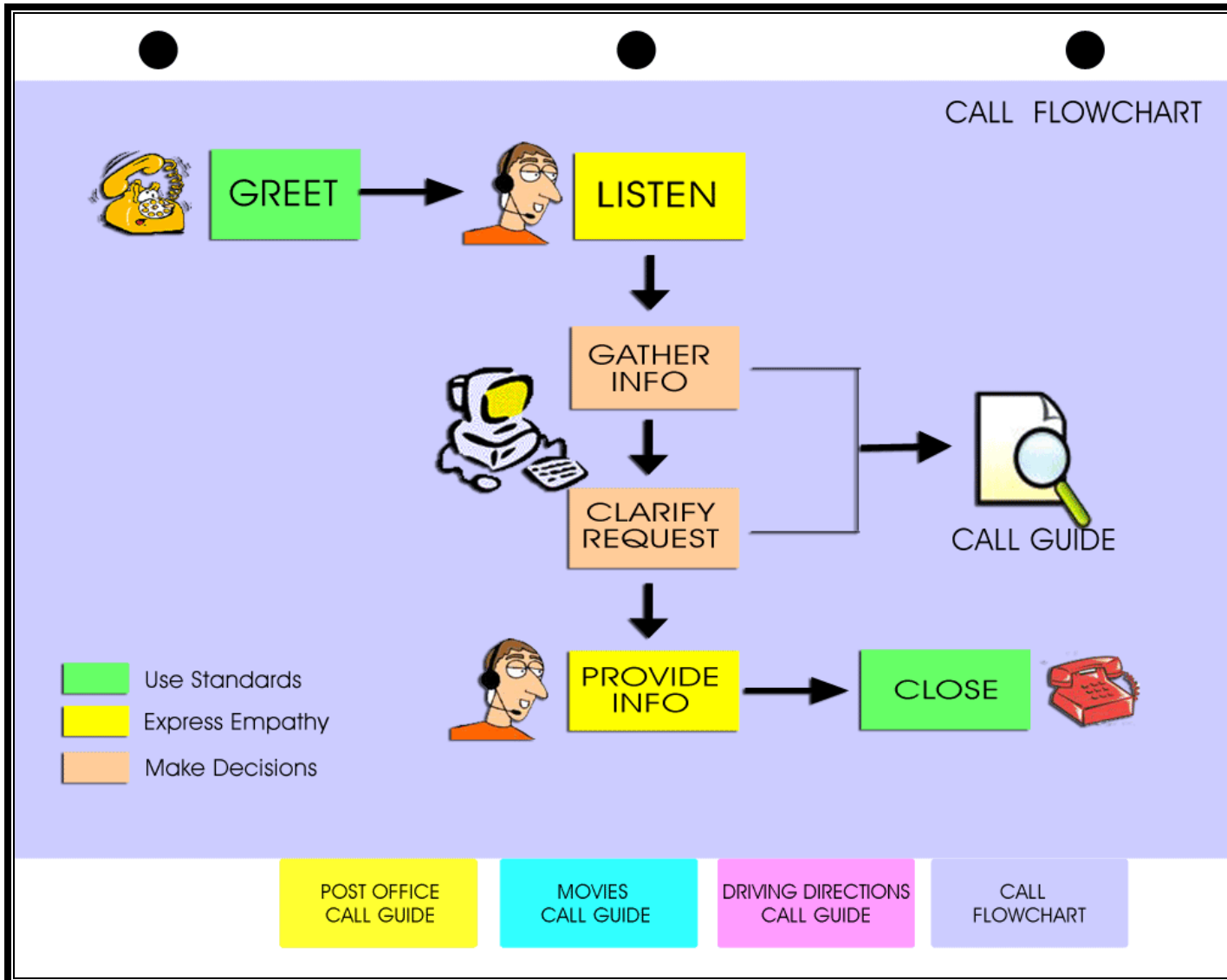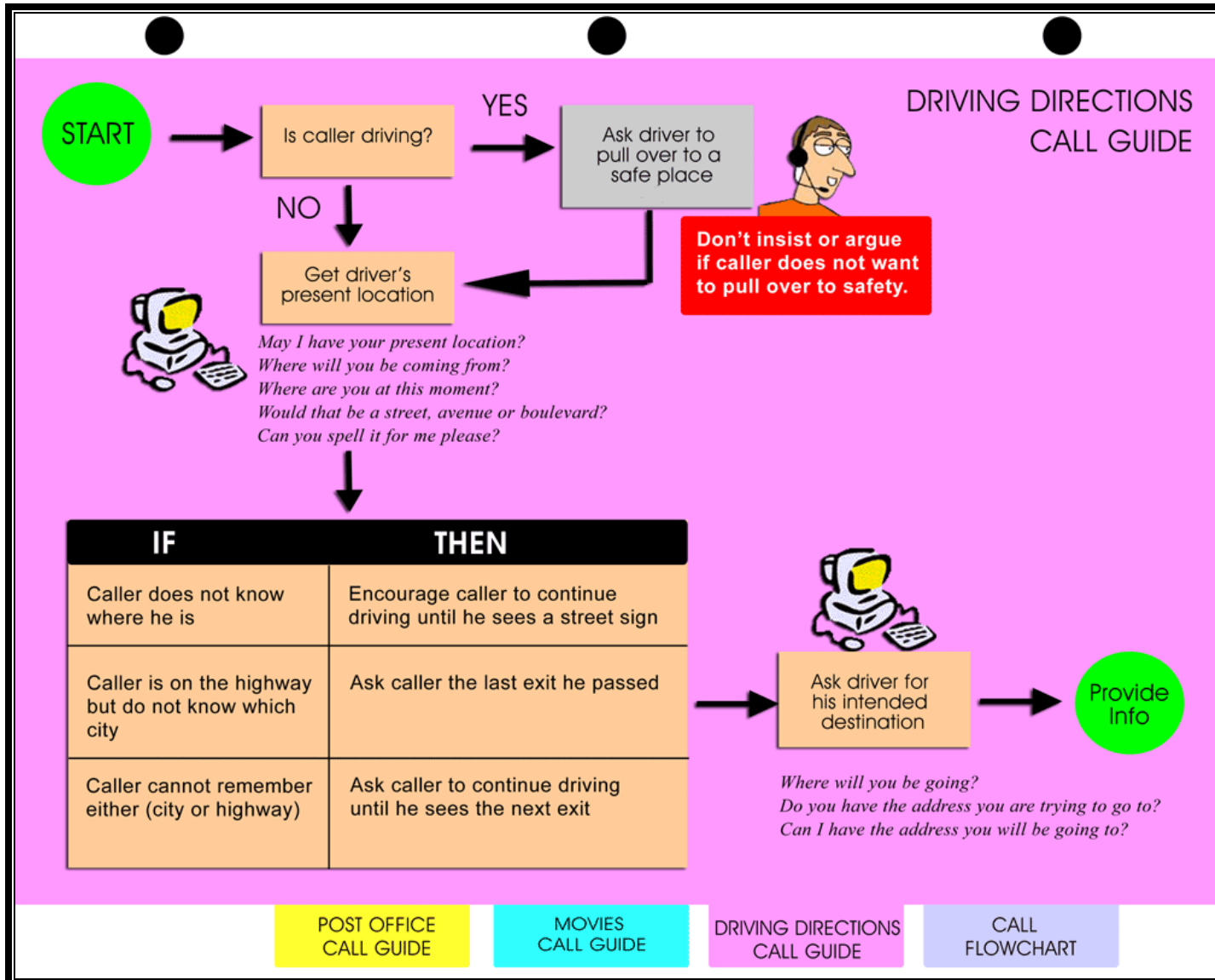## What I May Have Done Differently:

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Appendix B: Call Flowchart (in reduced form)

Appendix C: Driving Directions Call Guide (in reduced form)