A CALL CENTER AGENT IS NOT JUST A CALL CENTER AGENT

INTRODUCTION

Call centers are very demanding on their employees. They are disciplined environments where precision, control, and perfectionism are expected. Call center agents are required to deliver perfect calls with every client. Not everyone has the specific behaviors required to handle these environments and therefore staff turnover has become a serious industry problem.

In the call center industry there is a trend to treat call center agents as individuals who are capable of working in any type of call center. One often hears the saying, "A call center agent is a call center agent is a call center agent." The assumption is that you can use a standard profile to recruit any agent for any type of call center in any industry. Currently many call centers use generic assumptions and assessment tools to recruit new staff.

Our case study company is in the financial industry and runs a call center with 1,500-2,000 agents. The service provided by their call center agents range from inbound customer service in telephone banking, assisting customers that have a problem with ATM cards, and assistance with the company's web site, as well as outbound calls such as selling loans and banking services.

This financial company was currently assessing each applicant using a generic type of assessment that was intended to show their strength in certain attributes that would be beneficial to the call center environment.

PROBLEM

In our case study, the company (despite their current assessment process) was battling an annual staff turnover percentage of nearly 70%. This was a huge challenge and had a significant impact on the service provided to customers. This constant turnover of their trained, knowledgeable, and competent staff meant that they were continuously recruiting and training staff, only to lose them again within a year. Industry figures for call center turnover range anywhere up to more than 100% in extreme cases.

Because of the high cost to train call center employees, if an employee left within the first 12-18 months, it was a significant financial loss to the business. The employee had not yet started to be productive in excess of their cost to the company. The company was not even reaching a point of 'break-even' on the costs incurred as a result of recruitment and salary paid against productivity.

Assessments are designed to provide additional, critical information that help the hiring managers in organizations make a more informed decision about the likelihood of applicant success. While never a silver bullet, correct use of the information can make the difference

between a high performing agent with longevity, and an underperforming agent that leaves within six months.

In general, assessments fall into two main categories of Behaviors and Personality. There is a definite link between the two categories but Personality focuses more on "why" we do things vs. Behavior that focuses on "what" we do. There are infinite complexities behind Personality, and "why" employees do what they do, but "what" they do has an immediate and tangible impact on performance and executing work tasks successfully. Call centers are a perfect example of understanding this difference: there may be many reasons why agents don't have the correct behavior/actions in handling calls and customer issues, but an attempt to determine and understand the reasons is extremely complex and yields little value in terms of trying to change the required behavior. It is far more beneficial to understand the required behavior and simply assess for that in applicants. It is also more beneficial for the applicant; after all, how much benefit is an applicant actually getting from being assigned to a role in which they have little chance of being successful.

Simple assessments only measure the 'people' aspects of a call center agent; they have been developed to identify specific attributes that are supposedly suitable for any type of call center: Dealing with People, Altruism, Handling Conflict, etc. The rationale for this is that the primary role of a call center agent is dealing with people and therefore they are biased towards this. However, they do not assess many other critical habits necessary to be successful in specific environments: for example Time Management, Conceptual Application, Resilience, Ownership, and Delegating.

Not all call centers are the same. Specialists distinguish between different levels of complexity in call centers. In some, the role is 'linear' (the call center agent needs to do very simple and straightforward tasks in order to provide good customer service such as giving a customer a balance on his account). In other call centers, the role is 'lateral' (an agent might need to take an action in order to provide service to the customer, such as transferring funds from one account to another).

A third type of call center, in terms of complexity, is a conceptual call center. In this type of call center, the service agent needs to interpret what the client says, provide advice, and then take action in order to provide customer service (such as giving a customer advice on different account plans, and then taking action in allocating necessary funds).

Further complications include the same type of call center agent being required to work during specific hourly shifts and working from home compared to in the office.

In our research with call centers, we have seen that the working behaviors of top performers are different depending upon whether they are the top performers of day shifts or night shifts.

Many call center operations "follow the sun" and so have to support multiple shift patterns. What is interesting is that the behaviors required to be successful during a late or night shift are consistently different in certain ways due to the requirement of asking agents to work outside a normal "9 to 5" schedule.

Similarly we have also found that the habits and behaviors that make people successful working in a corporate office environment are consistently quite different to successful people working out of a home office despite the job function being identical!

Looking at unique environments and requirements like these it is clear that a generic approach toward assessing whether candidates are suited for a call center environment will never accurately capture and predict employee success:

- No call center environment is the same
- Each environment has different complexities, cultures, leadership styles, and technology sophistication
- Each employee may be asked to work within specific shifts or work locations

It is therefore important to take both a holistic and specific approach when assessing whether an individual would be suited for a specific role in a specific call center.

Shadowmatch considers each applicant and each environment (which includes culture, leadership style, all the different aspects of the working environment, the team dynamics, etc.) when matching the habits of the successful performers, in order to predict what is necessary to be successful in that specific role

IMPLEMENTATION

In our case study, Shadowmatch was introduced to the top management team of the call center, and they immediately started using the solution for the recruitment of their staff.

They identified the top performers in each specific role and created almost 60 benchmarks, one for each specific role. Once the benchmarks were created, they started to match every applicant that was provided by the staffing agency to the benchmark profile of the top performers in each specific role. Where the call center previously indiscriminately employed all candidates provided by the staffing agency, they now started to review potential candidates against the Shadowmatch benchmarks, and only placed those candiates that were a good fit.

Shadowmatch immediately enabled this financial company to employ people that were a match to successful performers in each of the divisions. By having the benefit of almost 60 specific benchmarks and not just one generic call center profile, they could now place people in the team where they were best suited with a high level of precision.

In one of the call centers the following results came out as important habits to be successful in the role:

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- Propensity to hand-off: we usually assume that a successful call center agent needs to have a habit of taking ownership. In this call center one of the most critical habits was delegation.
- The habit of discipline: this refers to the habit of working in an environment regulated by policies, procedures, rules, and regulations.
- The inclination toward teamwork
- The ability to work positively with other people
- The ability to handle conflict
- The ability to work in a routine environment
- The ability to apply one's conceptual ability (30%): the top performers scored 3 out of 10 for conceptual ability. This is an important indicator. No one scoring significantly more or less would be successful in this role

The next step was to have all current employees complete the Shadowmatch Worksheet. We found the following results:

- The call center agents' habits ranged from taking ownership to being able to hand things off
- The conceptual ability ranged from a score of 0/10 through to 7/10
- Top performers completed the Shadowmatch worksheet much quicker than other agents
- The agents' attitude (approach to their world) was very diverse. Some staff displayed an attitude of being dominantly uninvolved, but the top performers displayed an attitude of being dominantly involved and unaggressive.

We asked the management team to identify the average/poor performers and then used Shadowmatch to rank the staff against the benchmark. It turned out that only 8 of the 32 staff were a close match to the top performers. According to Shadowmatch, more than 15 of these staff members would not be successful in this specific call center. Upon checking with the management, the names of the poor performers almost perfectly correlated to Shadowmatch rankings. We also learned that some of poor matches to the benchmark had already resigned within their first month of employment. All of these staff members had been selected according to the generic assessment solution with a prediction to be successful in the call center.

VALUE

Shadowmatch provided three distinct results:

1. It allowed the call center management to recruit and place people that had similar habits to the top performers in a specific area of business. This resulted in the new recruits quickly becoming top performers.
2. The ability to place people precisely shortened the training time. Because the new employees already shared the habits of the top performers, they immediately fit the team and quickly learned the competencies and skills. Upon interviewing some of these

new employees about their early success, they said, "These are my kind of people. I feel comfortable working in this environment and in this team."

3. The call center was able to reduce the annual staff turnover by almost 50%. In a period of ten months, they reduced their staff turnover from 70% to 26%. The precision capabilities of Shadowmatch immediately allowed them to retain their staff for a longer period.

CONCLUSION

Employees see call centers as a "commodity" role. Despite high unemployment, the role is not (typically) seen as highly desirable and therefore staff loyalty is low. This is one of the key reasons call center agents will "jump" to new companies based on slight increases in compensation. In fact, in areas where call centers are heavily concentrated, we have heard companies complaining of a "revolving doors" of staff who leave to work in other organizations, only to show back up again in the same training classes after 18 months.

For this reason, it is imperative to match the applicants to the precise role and environment where they will be successful. Any mismatch in this area leads to a recurring process of increasing turnover: either involuntarily due to performance, or voluntarily due to the "grass is greener" attitude from the employee.

In this specific case study, it became clear that you could not recruit successfully using generic assessments. The assessment used must be specific to the role and the environment. The top performers in an environment are always the best indicator of which habits are necessary to be successful in their role. This is the very reason why Shadowmatch has consistently proven to be the best way to precisely recruit and develop people.