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BY JOE FLEISCHER

# Taking Agent Training Beyond the Classroom

Your first decision about how you train agents ought not to be which e-learning software you purchase. The more important decision is how you mesh e-learning, which refers to the dissemination of electronic training material among agents' computers, with classroom training.

Why? E-learning software employs an efficient method for delivering recommendations for, and examples of, how agents can communicate effectively with customers. Slide presentations, excerpts from recordings of conversations with customers and excerpts of video footage from classroom courses are among the types of material you can easily enable agents to view and listen to on their computers. E-learning software lets you provide this material to agents during their downtime or during specific periods that you set aside for training.

E-learning, like call monitoring and coaching, is a component of performance management. These disciplines are interrelated, but they have distinct aims. Call monitoring is the basis for evaluating agents. Coaching

follows up on an agent's evaluation, and it refers to recommendations from the agent's supervisor and/or from quality assurance staff about how that particular agent ought to interact with customers. The difference between coaching and training in call centers is that coaching involves individuals; training courses involve groups of agents. What's often unique to an individual agent is the combination of courses and materials that you assign to the agent based on the evaluation the agent received and based on the coaching that follows from the evaluation.

Discussions about training agents invariably expand their scope to refer to other endeavors that are essential to developing agents, such as call monitoring, evaluation and

coaching. That's especially true with regard to discussions with vendors that offer performance management software suites, which, in turn, include modules that deliver training material to agents. With that said, our focus in this article is on software that call centers use to train agents, and about how centers can use this soft-

E-learning software for agents  
doesn't replace classroom  
training; it makes it better.

Here's why.

ware alongside, rather than instead of, classroom training.

Before we begin our discussion of software for training agents, we need to clarify the difference between training software and training services. Training software refers to tools that call centers use to disseminate, and, to a lesser extent, create electronic material for agents. Quite a few developers of training software also offer their own materials, including fullfledged courses, for training agents on skills that most centers expect agents to improve with experience, such as communicating with irate customers. Companies that offer training services have dedicated teams that not only conduct training, both onsite and during Webinars, but also possess the

ability to develop entire curricula around the profession of customer care. ICMI, the publisher of this journal, is an example of a provider of training services.

In an upcoming article later this year, we'll outline best practices for training agents. In addition, to learn more about the latest trends in supervisor training, read this month's People feature, **SUPERVISOR TRAINING: STATUS QUO IS NO LONGER SAFE.**

What follows is a perspective from a call center training software developer, Mark W. Brodsky, of Ulysses Learning, about how companies can link training to agents' overall professional development.

## How do you distinguish between skills agents need to develop, and the traits they ought to possess, to succeed in their roles?

### MARK W. BRODSKY

*President and CEO, Ulysses Learning*

Agents need to possess certain innate personality traits and aptitudes to be successful, which include having a customer service orientation; basic problemsolving ability; willingness to follow procedures; and an appropriate level of work pace, to name a few examples. These innate traits and aptitudes are most often not directly trainable since the individual develops these over a lifetime.

Attempting to develop these in training sessions would be akin to signing them up for "lifetime cha-cha lessons" where, over time, they might learn the steps but never the dance! Assessing for these traits and aptitudes is best done during the prehiring screening process. An added benefit of ensuing that your agents have these innate traits and aptitudes is that they tend to do quite well when it comes to learning the skills and knowledge that are directly trainable, compared with those who don't possess them.

When considering how agents can improve their proficiency as a result of training, it's important to note that many call centers might be looking in the wrong places. It's true that systems training and product knowledge are among the areas that can be most readily trained. However, these are most often not the areas that will develop an agent's proficiency as it relates to delivering quality customer service.

This was made clear by the American Bankers Association (ABA) research study that interviewed 300 call centers, asking them how they allocated their training resources. The ABA found that companies spent 60 percent on systems training, 30 percent on product knowledge and 10 percent on "soft skills."

But when the ABA listened to customer conversations, they found that customers were, in general, pleased with agents' product knowledge and how they

appeared to enter and retrieve information from their systems. However, they were frustrated with the agents' lack of effective "soft skills" or customer service skills.

The fact is that agents are often trained on their company's products, services, policies, procedures, and technology, but they often fall short on knowing what to do with all that information when they're handling a call attempting to solve a customer's problem.

Agents can dramatically improve their proficiency by learning core customer service skills including knowing how to:

- > take control of the call, no matter what the customer emotion;
- > quickly and effectively get to the root of the customer's problem by asking the right questions and listening;
- > resolve the problem within the company's policies and procedures;
- > ensure the customer accepts and feels good about the solution; and
- > do all that in one customer contact.

The good news is those core skills and knowledge are readily trainable and will have the most profound impact on the agent's ability to deliver quality customer service. However, this requires training deeper than simply giving them tips and techniques. Through a combination of e-learning, facilitated discussion, coaching, and mentoring, agents can develop the customer service skills needed to consistently deliver the quality experience that today's customers demand.

## In what circumstances do you believe it makes sense for call centers to apply the knowledge of more experienced agents when they train individuals with less experience?

It makes sense to apply the knowledge of more experienced agents to serve as "mentors" to train individuals with less experience when the call center has sufficiently defined its new hire training process to know how,

when, and where to effectively use this approach. With that being said, it's important to note that using top-producing agents to be trainers and mentors can be a drain on company resources and on the agents themselves if not done with careful planning and forethought.

The following factors should be considered to ensure you get the maximum return on your investment using agent mentors:

1. Define a specific area of focus and set time for the agent mentor to train: The trap that some organizations fall into is using their top agents to provide overall training for less experienced agents, which is a difficult, long-term task. Instead, it's best to have agents and mentors train around a specific skill and also define how long they will provide the mentoring versus leaving it open-ended. If, for example, one agent has been identified as excelling in asking the right question at the right time, an organization would want to have this person mentor other agents on this specific skill for a set period, such as two weeks.
2. Don't use the agent/mentor as a substitute for providing new-agent coaching: It's important to draw the distinction between mentoring and coaching. Coaching is crucial to the training process and needs to be provided from someone at the management level. A coach is someone the agent is accountable to for job performance. However, a mentor is a trusted advisor and provides a safe, confidential environment for learning. A combination of coaching and mentoring is the best way to develop and maintain agent skills over time.
3. Use the agent mentor at the optimum time in the training process: The best time for new agents to be mentored is after they have been on the job for three months, when the organization would have had time to monitor and coach them and also identify trends and deficits in their performance. At that point, a mentor can be an ideal way to help an agent address the areas that need improvement.
4. Identify and equip your agent mentors using best practices: When selecting experienced agents as mentors, it's important to look for more than simply employees who are top service providers or sellers. Mentoring best practices include:
  - a. Proficiency —The mentor needs to be proficient in using the call center's prescribed processes.
  - b. Time —The mentor needs to be given adequate time to mentor.
  - c. Desire —The mentor needs to enjoy being in the mentoring role.
  - d. Confidentiality — The agent being mentored needs to trust that the details of the session aren't being shared with management, and the mentor should be seen as a trusted advisor.

## What would you recommend as the best ways to mesh classroom training with computer-based training for call center agents?

The best way to mesh classroom training with computer based training, or e-learning, is to first recognize that e-learning alone, no matter how expertly crafted, will not typically provide an organization the sustainable performance improvement results they desire.

When deciding on the right combination, it's important that an organization uses the right learning method to accomplish the right learning objective. For example, well-designed simulation-based e-learning might be far superior to have agents learn and practice customer service skills in a safe environment, rather than just having them role-play the skills with partners. On the other hand, a facilitated discussion or exercise might be the best method for having people share and talk about barriers to applying the skills they've learned versus just having them only go through an e-learning program.

When training resources and training facilities are available, Ulysses Learning recommends a combination of classroom training and simulation-based e-learning, with the mix typically being 80 percent of learning through simulation-based e-learning and 20 percent of learning through facilitated discussion.

Ulysses Learning recommends that the initial agent core service and sales skills training be done away from the agent's workstation, typically in a classroom or possibly in a learning lab, if those facilities are available. This enables agents to focus, learn, practice, get feedback and reflect on the core skills they are developing.

Contrary to what's been popularized over the past few years, agents can't effectively learn core service and sales skills at their workstations in 15 minutes or fewer because this is insufficient time to focus, learn, practice, get feedback and reflect, which are the necessary steps required for adults to learn. However, once the core skills are learned, reinforcement and refresher training in scheduled 15-minute increments at the agent's desk works well to help maintain learning gains along with the required coaching and mentoring.

Using the classroom or learning lab approach, the training process begins with a facilitator briefly introducing the skills the agents are to learn. Then the agents are assigned the related simulation-based e-learning module for each to complete working independently at computers set up in the room. Agents go through the training at their own pace, learning, practicing, getting feedback, and testing their proficiency level as they work through simulated calls with simulated customers.

After the agents have finished the assigned simulation-based e-learning module, the facilitator leads the agents through discussion and additional exercises to ensure that they are well-equipped to apply the skills back on the job. Each classroom training session typical-

ly lasts two to three hours each, with three to four sessions conducted over the course of a week or several weeks — allowing 12 hours in total training time for core service and sales skills. Allowing time between sessions enables agents to apply the newly learned skills on the job while they receive feedback from their coaches.

Using a variety of e-learning and classroom training methods works especially well for the younger generations, such as Generation Y, who now make up a good portion of the call center workforce. Training methods that were acceptable 10 years ago aren't as successful with this new generation of learners who like to be totally engaged, stimulated and challenged. The combination of simulation-based e-learning and facilitated exercises resonates with this younger generation.

### Based on what your clients have shared with you, what trends have you observed with how your clients train agents now versus last year?

Overall, we've seen the following two trends pick up momentum in recent months.

First, although a combination of classroom and elearning works well for many organizations, other organizations have sought a more self-directed learning approach that requires fewer training resources and enables large numbers of agents to be effectively and rapidly trained even if they are dispersed locally, nationally or around the world. It's worth noting that much of this self-directed learning is taking place in the field rather than in a training environment.

As call centers do more of this type of self-directed learning, an important consideration is that e-learning needs to be interactive and engaging so it holds the agent's attention and provides adequate opportunity to learn and practice the targeted skills. Also, other applicable self-directed learning methods need to be used to ensure that the right training method is aligned with accomplishing the right training objective (as I addressed in my answer to the previous question). Furthermore, adequate time away from the phones needs to be allotted for the agent to be trained (also detailed in my previous response) even though a self-directed learning method is being used.

Second, we've also seen that organizations are realizing, more than ever, that customer service agents are an extension of their overall brand and at the front line of delivering the corporate brand promise. More companies are making sure that agents are trained and skilled in how they deliver their service through a branded, differentiated process and call flow. This way, a customer's interaction with an agent mirrors the messaging and approach experienced in all channels of customer contact and distribution, helping to uphold and reinforce the company's brand.

### Within the past 12 months, what are the most important new capabilities your company has introduced with regard to its software for training agents?

As described in my response to the previous question, a growing number of Ulysses Learning's clients have sought a more self-directed learning approach that requires fewer training resources and enables large numbers of agents to be effectively and rapidly trained even if they are dispersed worldwide.

In response, Ulysses has taken its proven learning methodology that has been validated and implemented over the past 10 years for developing service, sales, and coaching skills and has developed a solution that enables clients to rapidly deploy a self-directed learning approach. This flexible approach can be used for training a handful of agents locally or for training hundreds or even thousands of agents located regionally, nationally or globally.

Our self-directed service, sales, and coaching training solutions utilize our award-winning simulation based e-learning and blends it with other applicable learning methods that are designed to be self-directed. We've further streamlined the related technology so clients have the option of having the simulation-based e-learning portion of the training stored locally on the agent's computer, accessible through the organization's LAN/WAN or through Ulysses' application service provider or any combination of the three. Our enhanced technology has enabled our training solutions to be readily deployed from North America to India, Malaysia and other locations in between.

We continue our commitment at Ulysses to researching new technologies to assess their impact upon learning and call center performance. We incorporate them in our solutions only when the documented learning gains provide our clients a demonstrable and measurable return on investment.

▶ You can reach Ulysses Learning at 800.662.4066 or visit their website at [www.ulysseslearning.com](http://www.ulysseslearning.com). For more information e-mail [info@ulysseslearning.com](mailto:info@ulysseslearning.com)