

# Implementing Competencies in a Call Centre Environment



Case Study

### Call Centre Case Study

We recently completed a piece of work in a large Call Centre for a client in the banking sector. The following case study is written by a member of the bank involved in the project.

Over three years, the Call Centre experienced rapid growth. During this period, it was evident that, whilst development in IT and other areas had advanced, the Call Centre had not addressed some core human resource development issues:

- Recruitment
- Managerial Development
- Succession Planning

Whilst continuing to focus on growth, the Call Centre needed to address a number of key issues, which were as follows:

- Low levels of Customer Focus and Sales Opportunity Recognition
- Staff not performing to the levels expected
- No consistency amongst the management population of expected performance levels from their staff
- There was no benchmarking process in order to assess whether the person working within the Call Centre environment was suited to such a job role
- There was a general lack of a Performance Orientated Climate within the Call Centre as a whole

The Call Centre was quite unique as it incorporated both Banking teams and Direct Investment teams. However, in both teams there were many opportunities for recognition and cross referral of sales prospects which were not being identified by the consultants.

Two years ago the company, together with Glowinkowski International developed a generic Managerial Competency Framework. At the level of Team Manager, the generic Managerial Framework had been used to develop managers and give them feedback on their performance. The use of the framework ensured a 'level playing field' approach to performance management. Managers had an equal opportunity to succeed as they were evaluated using the same quantitative competency based measurement.

The behavioural competency framework represented considerable value to the managers. They had a very clear understanding of what their strengths were in behavioural terms, what their development issues were, and how they needed to address them. There was buy-in to the process due to the fact that the feedback process was based upon their own input. The result was an unbiased approach to benchmarking and evaluation that ensured commitment from the managers.

However, in discussions between the company and Glowinkowski International, the view was expressed by the Glowinkowski team that while the company had an extremely

effective generic Managerial Framework, the Call Centre needed a bespoke version of the framework specific to the requirements of the Call Centre. It was recognised that too many Call Centres in the UK had adopted generic Competency Frameworks (mainly consisting of "off the shelf" Competency Frameworks), rather than developing a Competency Framework that was designed specifically for telephone consultants within a Call Centre environment.

At the time, the telephone staff were assessed using simple monitoring forms, not very different from those used in most Call Centres across the country. In terms of benchmarking capability they failed to recognise some specific behaviours that appeared to be unique within a Call Centre environment, due to the verbal nature of the delivery of the behaviours during telephone conversations with customers. Therefore, although there was a high level of feedback on what was wrong, there was not a clear understanding of the "how?" or "why?". Consequently, there was little positive movement in terms of increasing the levels of performance at the telephone staff level.

The question posed by Glowinkowski International was "Why do you not develop the same basic competency approach for telephone sales staff, having regard for the fact that their behaviour with customers is verbal in nature?"

The view taken by Glowinkowski International was that there was no reason why a specific Call Centre study could not be undertaken, which would enable the company to implement a leading edge development process for Call Centre operators. To the bank's knowledge, such an approach to Call Centre consultant development had not been adopted anywhere else in the UK. At the same time it would provide a very valuable tool for recruitment purposes, and perhaps more importantly, succession planning in terms of enabling the Call Centre telephone operators to develop towards achieving Team Manager grade.

The study was undertaken in two specific areas:

- Banking
- Direct sales of financial products

We started the process by gathering data from a cross section of the Call Centre's telephone staff, including a number of competency based interviews of the management population.

Following the initial process of data gathering, it was found that in a number of cases, particularly within the Banking environment (which is mainly transactional), Sales Opportunity Recognition was not being delivered in verbal behavioural terms. However, this was a key behaviour necessary to ensure that there was recognition of the cross-sales opportunities existing within the Banking and the Direct Sales operation.

Additionally, given the low level of customer focus and sales opportunity recognition amongst the general Call Centre operator population, it was decided that a framework should be implemented which would include a set of behaviours that would be common to all members of the telephone population. This would permit the business to maximise the effectiveness of the Call Centre staff as a whole, develop a clear Performance Orientated Climate, and also to ensure that it was possible to move staff from one activity to another, thus delivering greater flexibility in terms of the Call Centre staff.

It was believed that a verbal behavioural approach could be used specifically to enhance the performance of telephone operators, which would, of itself, deliver higher sales performance, and customer satisfaction levels.

Following the study, a specific Call Centre Competency Framework was developed to address the key performance requirements within the telephone environment. Each Team Manager of the Call Centre was trained to evaluate Call Centre operators in terms of three levels of verbal behaviour delivery (competency).

- **Level 1** - a Call Centre telephone consultant with six months or less experience
- **Level 2** - a Call Centre telephone consultant with between six months and two years experience
- **Level 3** - a Call Centre telephone consultant with more than two years experience

The levels were based upon the experience of each operator, as it became apparent that certain verbal behaviours developed as confidence grew following a better understanding of the job and a greater level of skills and knowledge.

In order to ensure that we had a baseline reading in terms of evaluating the Call Centre operators prior to any competency development, Glowinkowski International undertook a telephone evaluation of 85 telephone operators within the Call Centre, based upon 45 minutes of each consultants' calls. A painstaking process that paid dividends.

The operators were assed against the competencies.

The benchmarked data that was gathered during the assessment process indicated that 25% of the Call Centre telephone consultants were delivering verbal competency behaviour at a low level. This indicated to both Glowinkowski International and the management staff of the company that there were a number of people within the environment who were perhaps not suited to the type of role that a telephone Call Centre offered.

Following the study, it was decided to implement the Competency Framework by way of a process of one day Competency Awareness Workshops for consultants and a three-day Coaching for Competency training for the Team Managers. Conducted by Glowinkowski International, the workshops gave the Team Managers the skills necessary to:

- Deliver coaching and development within a competency context
- Deliver difficult messages by enabling staff to recognise the issues themselves
- Gain a commitment to the delivery of competency feedback as a way of enhancing the staffs' and managers' performance.

In order to give the programme a high profile, a proportion of key performance indicator payments were linked to monthly competency feedback. This had a large impact in ensuring the success of the programme.

Following seven months of monthly feedback and coaching carried out by the Team Managers, we found, having monitored the process, that the telephone operators within the Call Centre had moved from a position of only 50% of the population meeting the threshold score in behavioural terms, to 87% meeting or exceeding the threshold score.

Customer satisfaction, as monitored by outside sources, has grown to a current level of 92% over a similar period. In addition, one of the key behaviours recognised as being essential within a multi-departmental Call Centre operation, namely that of Sales Opportunity Recognition, which would enable cross-referral sales business to be transacted, was being delivered from Banking across to Direct.

The additional benefits gained from the development and implementation of a specific Verbal Behavioural Call Centre Competency Framework was the use of monthly data from telephone assessments, allied to coaching sessions. This enabled the company to manage performance in a clear and transparent manner. No longer was there potential in the environment for the "blue eyed boy" syndrome. There was a level playing field for everybody to seek to improve their performance and thus enhance their career possibilities within the company.

Following the success of the framework, a Competency Based Interview recruitment process has been implemented, using the Framework to ensure that, when hiring Call Centre personnel, the people hired are suitable for the specific job role - that of telephone consultant, rather than on the basis of having a pleasant personality.

Prior to the commencement of the Competency Study, the staff turnover rate within the Call Centre was at the 29% mark. Following the implementation of the Competency Framework, this has steadily declined to between 16 - 18% currently, generating additional saving on recruitment costs.

The general Climate of the Call Centre is now one of Performance Orientation. Both the Team Leaders and the Call Operators have a very clear indication of what is required of them and fully appreciate that in order to advance their careers, Behavioural Competency development is one of the key requirements, in addition to the general skills and knowledge of our business.

The development and implementation of the Call Centre Competency Framework appears to have addressed the key issues of under-performance within the environment prior to the intervention being undertaken. The data continues to

be monitored on a monthly basis and it has clearly linked the overall improvement in performance to the benefit of the company and to individual staff as they continue to own their personal development.





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