PREDICTING SUCCESS BY DEFINING CALL CENTER COMPETENCIES

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Predicting Success by Defining Call Center Competencies

Abstract

Receive "nuts and bolts," practical information regarding contact center competencies. Discover how competencies fit into the infrastructure of the contact center. Understand how to define competencies, and make them relevant to front line agents.

Competencies are predictors of success. The first step to building a competency-based contact center is to identify what is required to be successful at each job. After that, it is a matter of breaking the competencies down into their smaller pieces—the knowledge, skills and attributes for which you must either hire or train.

You should integrate competencies into your job descriptions, hiring process, performance assessments, measures, performance appraisals, coaching, disciplinary process, and reward and recognition programs. The article contains examples of how to go about it, and tools—an assessment grid and a sample portion of call monitoring form—to help make it easier.

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Predicting Success by Defining Call Center Competencies

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You probably get a ton of them in the mail just as I do. Seminars targeted just for contact centers. The topics cover everything you could ever imagine...could ever hope to learn. One topic that has been highly publicized lately has plagued me. I attended several seminars and, while the information was good, I couldn't figure out how to make it happen.

Those of you who have read my other articles know I'm not content until I can explain something in plain English and in a logical, practical, step-by-step fashion. If you don't walk away from my article or seminar with the know-how to **DO** something, I haven't done my job.

The topic that was driving me crazy was "competencies." Everyone was building a competency-based program. But no one was giving me practical insights on how competencies fit into the infrastructure of the contact center and integrated with all its performance management linkages. What really frustrated me was that I couldn't find an exhaustive list of competencies for contact center employees. Without this kind of "nuts and bolts" information I didn't know how to move forward.

In the process of learning, I developed the competency model shown in the diagram. Hopefully it will help you as you develop a competency-based program for your center.

What's a Competency?

Let's start at the beginning. What is a competency? Competencies are predictors of success. For example, a contact center agent is likely to experience success if he demonstrates excellence in listening, speaking, problem solving, customer service, etc. These areas of excellence are competencies. I quickly learned that there is no one right list of or names for competencies. Who's to say that "team work" is a better name than "team centered" or "team support?" As long as you cover all the bases required to be an expert, then your list of competencies can look very different from someone else's.

Identifying Competencies

The first step to building a competency-based contact center is to identify the competencies required to be successful at each job. This means you have to understand the purpose of the job and the results you want to see. Then, you consider the requirements to achieve those results. A couple of ways to determine what contributes to a person's success is to profile your current experts and ask your customers what is important. After doing your homework, you may find your list of competencies for a contact center agent looking something like this:

1. Communication
2. Interpersonal Skills
3. Gathering and Analyzing Information
4. Problem Solving and Decision Making
5. Stress Management
6. Presenting and Negotiating
7. Customer Service
8. Job Knowledge
9. Work Quality

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10. Work Quantity
11. Work Habits
12. Flexible
13. Personal Growth
14. Team Work
15. Innovation

Defining Competencies

But this list, in and of itself, is not very descriptive. That's why your next step is to define each competency. For example, what does it look like when you are demonstrating excellence in stress management? One definition might be: "Maintains excellent performance, even in difficult periods, to complete work assignments or objectives within required performance standards. Maintains self-control and professionalism under adverse conditions. Maintains a sense of calm and orderliness in conflicting situations. Does not panic or become hysteric."

Each competency must have a definition so employees know your expectations and understand what the competency looks like when mastered.

Assigning Knowledge, Skills and Attributes

Now comes the hard part. How do you make the competencies relevant? It's great that you can tell someone what it takes to be a success. But you need more. Can you imagine an employee's frustration when told, "It appears as if you're struggling with stress management. On that last call, when the customer got angry, you did not manage the stress well. You need to improve. Try harder next time.?"

Most of us would want to yell at the manager and say, "Well, just how do you propose I do that? If I knew how, don't you think I'd be doing it already?"

So, to keep this kind of frustrating experience from happening, you can define the knowledge, skill and attributes (KSAs) of each competency. These KSAs are the things that you can observe, measure and coach. In the case of stress management you may come up with KSAs like: talks out stressful events, attempts to resolve stressful events amicably, deals with the customer's personal needs before addressing practical needs, and demonstrates self-control in difficult situations.

Had the KSAs been defined in the previous situation, the conversation might have sounded something like, "I listened to that last call of yours. When the customer got angry, it seemed as though you struggled with managing the stress. For example, you lost control and yelled back. I've got some ideas on how to help you stay in control even in difficult situations. I'd like to set up some time to work on this with you."

Much easier to swallow, don't you think?

Integrating Competencies

Good. Now you know what it takes to succeed as a contact center agent.   You have a list of competencies, their definitions and the KSAs for each. But, what do you do to ensure this has its intended effect throughout your contact center performance management infrastructure?

You can integrate these competencies into your job descriptions, hiring process, performance assessments, measures, performance appraisals, coaching, disciplinary process, and reward and recognition programs.

Job Description and Hiring Process

When you write a job description, list the required competencies and their definitions. From this list, determine which competencies and their corresponding KSAs you will hire for and which you will coach to once you hire the person.

For example, let's say that a company has "communication" as one of its competencies for agents. The company has defined one of the required skill components of excellent communication to be: "The customer does not ask the agents to repeat spoken words or sentences repeatedly." Let's say this company has received multiple customer complaints about not being able to understand employees with heavy accents. Therefore, this company had to decide how to handle this situation. It had the option of hiring for this skill or training it once they hired the person. The team decided to screen for heavy accents during the hiring process since they did not have the internal resources to coach on accents once someone was hired.

Some skills you'll coach to, some you'll hire for. Still others you'll hire at a certain proficiency level and coach to a new level once in the door (e.g., keyboard skills).

Develop Assessment Process

Once you've hired your people then your task is to figure out how to assess them. There are two types of assessments. The short-term assessment determines if there are any coaching opportunities for an employee. The long-term assessment determines the long-term "fit" of the employee for the job. Both assessments reward excellent performance.

Short-term assessment
Every manager needs to assess the skill level of his employees. This ensures she rewards excellence and determines coaching opportunities. In a competency-based program it is no different. One of the most difficult tasks in developing a performance management process is figuring out how to assess a person's skill level accurately and fairly. There are several methods used to assess the skill of agents. These methods include: call observation, reports, side-by-side observation, tests, customer feedback, and peer feedback. For each one of these methods, you design an assessment instrument. This assessment instrument lists the skills that can be assessed by that method. For example, you can't assess someone's attendance by call observation. Therefore, you would not put attendance on the call monitoring assessment instrument.

To assign skills to instruments, look at the skill and ask, "What are the best ways for me to assess if the employee has mastered this skill or is struggling with it?"

Let's go back to the stress management example. You might create an assessment grid that looks like this:

Competency: Stress Management

Skill	Call Monitoring	Report	Test	Customer Feedback	Peer Feedback
Talks out stressful events	X				X
Attempts to resolve stressful events amicably	X			X	
Deals with personal needs before addressing practical needs	X				
Demonstrates self-control in difficult situations	X				

Make sure that you assign each skill to an instrument. It's not fair for you to say that a skill is required in the job (in the job description) and then never assess it. By completing this type of grid, you tailor the various assessment instruments to your environment and ensure that you are assessing each competency (and its corresponding KSAs) completely.

Based on the example above, the stress management part of your call observation form may end up looking like this:

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Stress Management	Points	Skill Demonstrated (points achieved)	Coaching Opportunity	Not Applicable to this call	Possible Points	Earned Points
Talks out stressful events	3					
Attempts to resolve stressful events amicably	5					
Deals with personal needs before addressing practical needs	5					
Demonstrates self-control in difficult situations	5					

After you design your assessment instruments, you must figure out a scoring mechanism that tells you when an employee has mastered a competency or is struggling with it and needs coaching. This scoring system defines the level at which an expert performs.

Let's say you monitor 10 calls per month per agent. At the end of the month you total all the points achieved and all the points possible for each competency on the call observation form. You then produce a report that tells you the level of someone's expertise expressed as a percentage. If you monitored 10 calls and the total number of points possible for all the competencies was 2,226 and the employee earned 1,842, points, then his performance level is 83 percent (1,842 divided by 2,226).

But, does this 83 percent mean he is an expert? It depends. It depends on where you have set your performance standard.

If the person meets or exceeds your performance standard, then he is demonstrating excellent performance. You reward and recognize him for doing so. This short-term reward and recognition program is usually on the department level and includes motivational items other than pay (merit, variable, bonus) or promotion. Even for these experts, you also want to develop a coaching plan to ensure their continual development.

If the person has not met your performance standard, he needs coaching. You diagnose what skill(s) he is struggling with; write a coaching plan that details which skill(s) you will be investing in; and then spend time coaching to improve his performance.

Each month you repeat the short-term assessment process that results in coaching and reward and recognition.

Long-term assessment process
The long-term assessment process (commonly called the performance appraisal) is a summary of the employee's performance defined by a roll-up of the short-term assessments.

Let's say you used the calls monitored during the short-term assessments to help you measure long-term. In this case you would gather the scores from all the calls monitored during each of the short-term assessments. Then you would total all the points earned and all the points possible.

In the example of stress management, the total possible points available per call was 18. Since you monitored 60 calls over six months (and assuming the opportunity to earn all 18 points occurred on each call), then the total

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possible points for stress management over the six months was 18 times 60 or 1,080 points. If someone earned 980 of those points then he achieved a 91 percent level of excellence (980/1,080).

But what does this 91 percent mean? Just like the short-term percentage you determine your performance standard. Typically, on performance appraisals, you can rate someone on a scale (e.g., 1 through 5). Historically, the problem with these scales has been how to define each number on the scale to ensure you produce consistently fair performance ratings. What makes this system so nifty is that you can easily assign a percentage earned to each number on the scale.

If the veteran contact center agent's performance scale for stress management is:
- 1 = 0 percent to 30 percent,
- 2 = 31 percent to 50 percent,
- 3 = 51 percent to 75 percent,
- 4 = 76 percent to 90 percent, and a
- 5 = 91 percent or greater.

then you would rate the person's stress management performance in the above example as a "5" (since he earned 91 percent).

When a person meets or exceeds the long-term performance standard he receives reward and recognition such as increase in variable pay and/or bonuses, merit raises, and corporate-wide recognition. This level of performance may also be the foundation for promotion. You would also want to ensure his continued development by writing a coaching plan for new skill development.

When a person does not meet the long-term performance standard, then you write an action plan to help get him there. If the performance does not improve over a certain period of time (as defined by company policy), then the employee may experience disciplinary action and possible termination.

Use up-to-date, accurate and well-defined competencies as a thread to tie all of your performance management structure together. Everyone—supervisors, trainers, support personnel and front-line agents—will see that what they were hired for is what they are rewarded for—and what they were trained for is what they are expected to do.

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Kathryn Jackson, co-founder of Response Design Corporation (RDC) and call center expert helps professionals get more from their call center. Response Design is the how-to source for integrating the call center into the customer relationship. Its independent consultants use call center web seminars, contact center consulting, call center tutorials, call center benchmarking, world class customer service articles, and best-in-class customer service practices to ensure you get the most from your call center investment.

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