WOW CUSTOMERS THROUGH AGENT CERTIFICATION

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Abstract

Walk through the steps of establishing an agent certification program in your contact center. You will be rewarded for doing so. Customers will notice the difference in the level of service they receive from certified employees. Morale will increase as employees accomplish fundamental and specific goals. Achievement will be recognized and prospective agents will be attracted to your center—a center willing to invest in their futures.

The article describes the pressures on contact centers to certify employees, and outlines the advantages of doing so. It addresses the real-life obstacles you can expect, and suggests strategies to overcome them.

You will be provided detailed guidance on the roles and responsibilities of a certification team—including its responsibilities to recertify and revisit the certification process. Although a certification program in your center will be unique yours, the article provides example levels of certification.

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WOW Customers through Agent Certification

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Ever wonder what's next in the quest for customer contact excellence and competitive advantage? I have to admit; I tire quickly of all the "new and improved" tools constantly flooding the industry. However, one has caught my eye. Never have I seen one tool solve so many customer contact management dilemmas or have such far-reaching customer and employee impact.

The tool? Customer Contact Agent Certification Programs.

In 1993, Drake Training and Technologies and Dataquest Worldwide Services Group found that, "The significant investment companies have made in training and certification is creating a positive return for them and their customers." The study (published in the February 1995 issue of Service News) reported that managers believe they receive more value from certified employees through higher levels of service, quicker assimilation of technology, and higher productivity. Certification was also an indicator of whether training efforts were effective and whether or not people had truly mastered certain skills. The study also expressed that certification is one of the early quantifiable indicators that companies are getting a return on their training investment.

Certification establishes precise job criteria that define clear expectations for employees. These specifications motivate people to master new behaviors and give coaches a precise track to follow when investing in the skill and knowledge of their people. Certification ensures everyone is moving in the same direction.

Certification lends credibility to the company's image. "Our people are certified. They have demonstrated the skills and knowledge required to provide superior service and sales."

Certification gives employees motivational goals. It provides a framework for individual development—allowing employees to choose the track that's right for them. Often front-line employees are "picked" from our contact centers to serve in other departments because contact center operations have found it difficult to establish a meaningful career track.

Certification recognizes and rewards individuals for growth in skill and knowledge. It is a formal evaluation process that tests and confirms individual proficiency levels. This builds self esteem and company pride.

Why Now?

Certification has always been a part of the quality movement. However, there have been two major hurdles for certification in the customer contact industry.

First, many people felt that the quantification of soft skills was impossible and customer interaction skills were so prone to variation that objective assessment was a dream. It was hard to assess if someone was courteous or empathetic consistently. To overcome this hurdle, we had to translate these "soft" issues into quantifiable, observable behaviors.

Second, the customer contact developmental skill levels were undefined. Many managers evaluate a agent at the expert level whether they have been on the phone five years or five minutes. Few contact centers had specific beginner, intermediate, and advanced skill sets identified.

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Recently, we conquered both hurdles. The following steps outline how to take advantage of these recent developments and set the stage for competitive advantage.

Steps to Develop a Certification Program

1. Define an expert in your environment.
Get a team of agents, supervisors, and trainers together. Brainstorm answers to the following questions:
- How do our customers define a quality interaction with our company?
- What skills and knowledge do our customer contact agents need in order to deliver the quality defined above?
- How can we define these skills and knowledge in observable behaviors? Ask the team to think how each skill and knowledge sounds when they listen to calls.

Don't get caught up in trying to develop "the perfect list" all at once. Step number eight is the continual improvement step that ensures your certification requirements are the best possible reflection of your customers' needs.

For example, if someone says that customers want an agent who is courteous, your team would list all the skills and knowledge related to courtesy.

One of the goals of this session is to state each skill in its "positive form." Suppose a team member says, "To demonstrate courtesy, a agent should not argue with the customer." During the brainstorming stage, the facilitator writes the thought on the board without asking the team member to reword it in positive terms. After all brainstorming is complete, the facilitator returns to the "not argue" idea and says, "How can we state this in the positive?" One idea might be to write, "Demonstrates respect for the customer's perspective."

Next, the facilitator makes sure all skills and knowledge are expressed in their "observable form." Perhaps someone states that each agent should have confidence. The team's goal is to define confidence, an internal characteristic, by its observable behaviors. The facilitator asks, "What will we hear on the call that tells us an agent is confident?" Team members may say things like; assertive responses, no long unexplained pauses, strong voice tone, and such. The facilitator records these ideas and continues to clarify as necessary.

2. Define customer contact developmental levels and their objectives.
Response Design has defined three customer contact agent developmental levels: basic, fundamental, and integrated. Beyond integrated, agents can start on a leadership certification program that prepares them for advancement or involvement on self-managed teams. You may define any number of levels. The goal is to outline discrete stages of development that encourage ease of learning.

Basic Level: In many companies, initial training covers every skill and knowledge the agents might ever need in their entire career. Not only is this expensive in terms of the time required, but it is also costly due to lower proficiencies and higher turnover. Agents seldom master any skill in this shotgun approach to training. The result is a longer learning curve and lower overall proficiency. Also, due to frustration and stress, many agents quit customer contact prematurely.

In contrast, during basic training, the agent learns the skills and knowledge required to meet the practical needs of the customer while maintaining the relationship with the customer (notice we did not say enhance the relationship). The objective is to get the job done without blowing a customer or employee fuse. In Response Design terms, the basic level is the land of the "mechanical" customer interaction. The agents follow a precise call structure that ensures success and builds confidence. They learn how to ask a limited number of probing questions and parrot the company specific greeting and closing.

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Basic level skills are taught in initial training and reinforced during coaching sessions once agents are taking live calls. Basic level certification sets the stage for the more complex fundamental and integrated skill sets.

Fundamental Level: The fundamental level is the land of effortless eloquence. The objective of the fundamental level is to meet not only the practical needs of the customer, but the customers' special (emotional) needs as well. Fundamental agents work on the delivery of their messages, adding finesse and style to each interaction. Agents continue to follow a structured format but move from a mechanical to a personal style of interaction. Agents learn these fundamental skills during individual or group coaching sessions after basic certification. Our experience indicates that it takes approximately 12 to 18 months to master the fundamental level.

Integrated Level: The integrated stage is the land of WOWing the customer. Not only do agents meet the practical and special needs of each customer, but they also recognize and take advantage of each opportunity to exceed customer expectations. Mastery of the integrated stage takes approximately 12 months of coaching beyond the fundamental level.

We have found that most contact centers manage at the fundamental level. Those who do are familiar with comments such as: "It's not fair to take those points off for that call. I said all the right words. I may not have said them in just the right way—but I said all the right words." (These comments typically come from a person at the basic skill level who is being evaluated on fundamental proficiencies.)

And, at the other end of the scale: "You can't take those points off just because I didn't follow the script exactly. My adapting to the customer is not adversely affecting my performance—in fact, I think it's enhancing it." (These comments come from an agent at the integrated stage who is being scored according to fundamental principles.)

3. Assign observable skill and knowledge behaviors to the appropriate developmental level. Take your list of behaviors from step one and match them to the appropriate developmental level from step two. Once you have completed this matching process, your task is to format an observation form.

4. The observation form. Each level of certification will have its own observation form. Coaches use the form to gain proficiency in observing behaviors. As a team, they score calls based on the form's criteria and discuss the nuances of expert performance. These coaching sessions also help refine the contents of the observation form.

Next, coaches use the form on the job or in practice simulations to observe customer contact agents. These observations serve as the foundation for performance feedback and coaching plans aimed at achieving certification.

Finally, the company uses the form as the foundation for the certification testing process.

5. Provide training and coaching to develop each individual's skill and knowledge. Training begins with the trainers and coaches. They must master each behavior before they can train or coach it. This ensures they are a strong role model for each proficiency. The training modules developed for each skill and knowledge should be self-directed and self-paced. They should include practice drills, exercises, role-plays, and simulations. Agents should have the opportunity to hear and model expert performance either through actual or simulated calls.

6. Establish a certification process and a proficiency standard. It's important to develop the step-by-step process to reach certification. Will you have only one test at the end of the process, or will you test at various stages? Must agents have a certain length of employment before they can test for certification? Can an employee "test out" of a certification level without going through the course work?

What level of performance do you require for certification? What practical guidelines will you use to assess if a person has achieved the proper level of proficiency? Will you test proficiency with only a written test or combine a written with a practical (real-world simulation) test? What score indicates a passing level of skill and knowledge proficiency? Who will administer the certification process to ensure fair results? Will you enlist the help of a third party to certify your agents, or will you certify in-house?

Also, will you require periodic recertification? If a person has an integrated certification, will you require him to recertify at the basic and fundamental level, or will your integrated certification include the basic and fundamental elements as well?

7. Roll out the program. Once you complete these six steps, you are ready to implement your certification program.

8. Follow-up. After the program rolls out, schedule periodic review sessions with coaches, trainers, and front line employees to keep the job proficiencies up to date. Simply repeat steps one through six. Be sure to include any relevant customer feedback as part of your discussions.

The Results

I have several predictions.
- Customers will notice a distinct difference in the level of service and sales they receive from companies employing certified agents. Before long, savvy customers will use customer contact certification as a primary factor in choosing a company with whom to do business.

- Companies will look for pre-certified agents to fill their new hire rosters, and they will market their certification programs as a competitive advantage.

- Premier agents will choose to join companies who are making an investment in certification.

- As a result of the events listed above, the industry will standardize customer contact certification requirements.

Will you be ready to compete in this environment?

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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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