

Framework Business Consultancy Ltd met with the Telesales Manager and the Call Centre Manager of a short term vehicle replacement company to discuss the training of their call handlers.

The call handlers currently worked with internal trainers when they began employment with the company until they achieved a certain level of competence which was usually around three months. This training was mainly knowledge based but with some basic selling skills introduced. Cancellations and complaints were high due to a lack of knowledge and skills such as rapport building. A solid sales structure was needed that built on a strong, professional customer service performance from all the call handlers.

Initially we spent time in the call centre to understand what the job entailed and the compliance issues that were monitored by the Financial Services Authority (FSA). The workforce was young so the training needed to be fun; therefore we used a car theme and called the course RACE – Repeated Achievement of Client Excellence.

We always evaluate our courses using Kirkpatrick's model for delegate reaction and also where possible for learning gain. We also provided a tick sheet that could be used by the Team Leaders to evaluate the third level, behavioural change in the workplace.

Initially we agreed that Framework Business Consultancy Ltd would design and write a 2-day selling skills programme for all call handlers. As the Team Leaders were not currently experienced in training and coaching we would then deliver further 90-minute sessions that would build on the key themes of the original 2-day course.

We would deliver the courses and then train the team leaders and trainers so they could then deliver the 90-minute modules in the future. We monitored all the call handlers producing a spreadsheet to ensure everyone went through RACE and the various 90-minute modules.

If you want more detail please read the full case study that follows.

ysis of needs and problems

We needed to understand the business and what the call handlers did on a day-to-day basis, so we spent time with the Team leader of training to obtain all the materials that new call handlers get to work through. We also discussed what was covered during the induction period and what they felt needed re-iterating or introducing.

The industry is monitored by the Financial Services Authority (FSA) so the Company were keen to ensure that all their staff is compliant. Therefore a structure, monitored approach to training was now required.

Formulation of solutions

This company had been going since 1990 and was still in the top 10 of fastest growing companies. The workforce was young – early 20's – many straight from school and all from the surrounding area. New people were recruited by word of mouth, by friends and family of existing staff or direct through the local job centre. The company offer short-term replacement vehicles for customers who have a non-fault motor accident.

All the modules needed to be relevant to the job roles and using a varied delivery approach due to the age of the staff, which was interactive and fun. We always take into account the different learning styles when designing our materials.

After our initial meetings we conducted a training needs analysis (TNA). The TNA identified that there was no structure to a sales call. Therefore it was difficult for the Team Leaders to monitor the individual call handlers. Cancellations and complaints were quite high due to lack of knowledge and skills such as rapport building. As previously discussed the Team Leaders had no training or coaching expertise. The call handlers were not as compliant as they should be with the FSA legislation. From all this information a proposal was then submitted for the work, which was accepted.

The first part of the programme would be a 2-day course. As the company worked with cars we had a theme throughout the programme so we called this module RACE – Repeated Achievement of Client Excellence. They would both be classroom days. Everyone currently working in the call centre would go through the course.

The modules would contain various breakout sessions. These would be a mixture of buzz sessions conducted individually or in pairs and some small group work in threes and fours. We utilised quizzes that were fun but informative, that also created healthy competition between the

I Centre Case Study

there would be some attitudinal change difficult to embed. We would use on-going role-plays, allowing the delegates to become conscious of these new skills and how they could be easily transferred to the workplace. We took into account the four learning styles as defined by Honey and Mumford: theorist, reflector, activist and pragmatist, when designing the modules.

The programme would be using evaluation based on Kirkpatrick's theories. We would conduct Level 1 and Level 2 during each module. Level 3 would use a tick sheet for continued coaching by the trainers and the team leaders to monitor how RACE skills were being utilised in the call centre. We would discuss Level 4 and how we could monitor return on investment with the Call Centre Manager as an ongoing project.

Implementation of solutions

Time was allocated for the writing of the 2-day course and 4 x 90-minute modules. Eight courses of 2 days were booked during October and November 2005 and the follow-up modules would run from March 2006 onwards. The first two courses would consist of the trainers and the team leaders. They would provide feedback on the materials and the role-plays. Future sessions could also be identified.

The maximum delegates were to be 12 for each course. We also agreed two people would sit in on each module – either a trainer or a team leader to monitor the delegate's performance and again evaluate the materials.

The future sessions would consist of a portfolio of 90-minute sessions that could be taken after the RACE course to reinstate the main messages. There would be 4 sessions:

- Listening and Questioning
- Solution Presentation – Features and Benefits
- Objection Handling
- How they work using the sales screens

Evaluation of Outcomes

We delivered the first two sessions and we identified that the final overall role-play was not easily understood by the delegates so changes were made. After these changes to the role-plays the Level 2 evaluation scores proved that the course was pitched at the correct level for the delegates.

We produced a spreadsheet that listed all the staff and what courses/modules they had attended and when – the date. Certificates

the RACE course and a further Certificate completed all 4 of the follow-up modules.

The general consensus of the management was that the training was producing results. The cancellation figures were dropping and complaints also. This meant that the Financial Services Association (FSA) rules and regulations were being more rigorously followed.

We also asked other external trainers, colleagues of mine to sit in and evaluate the course and the tutor's abilities also. This was to obtain feedback from peers but also to provide a contingency plan in case we needed associate trainers, due to illness etc.

Follow up activities: (Identification of new needs and problems)

Identified Follow up 90-minute modules on the following topics for the Call Handlers:

- Listening and Questioning skills
- Presentation Solution
- Objection Handling
- How to use the Call screens

And for the trainers, team leaders and possibly the senior clerks extra sessions on:

- Train the Trainer – using GROW model for coaching
- Social Styles
- Transactional Analysis
- Time Management
- Appraisal Training

Discussions with the Call Centre Manager and the Telesales Manager were held with regard to the above future sessions.

Regular meetings with the Trainer Team Leader ensured we were updated on any changes within the call centre. We also met up with various Team Leaders to get feedback on how their teams were performing.

A further day was spent shadowing a team leader to obtain further company knowledge in order to write the time management session.

Future projects would be leadership training and also some form of organisational development and cultural change programme.