



Contact Centre learning intervention and assessment

a case study from T10



Summary

A learning intervention for the UK contact centre of an insurance company's inbound and outbound telesales staff and all management layers, to implement a new Training and Competency scheme to achieve competency within regulated guidelines.

Business Issue

The UK arm of a global insurance company had received a multi-million pound fine from the Financial Services Authority (now the Financial Conduct Authority) for mis-selling and mis-representing its products as well as making silent telephone calls to the general public via its automated call system. The contact centre had been prohibited from making calls and new sales until a new Training & Competency scheme and call script had been written and approved.

Solution

The business agreed a learning intervention programme to implement the Training & Competency scheme, re-train all contact centre operatives, management and quality teams with competency based learning and assessments.

A core team of six consultants designed the learning materials and a further team of 30 consultants delivered and assessed the learning. The programme was delivered to inbound and outbound operators, first line and second line managers. The quality and compliance team were also in scope.

The operators' learning included:

- the regulatory and compliance points
- listening, conversation, communication and observation
- building relationships, empathy and rapport
- positive language, questioning, vocal impact
- why people buy
- customer profiling
- analysing data
- problem solving
- objection handling
- gaining and maintaining competency

The learning was delivered face to face by pairs of trainers.

The methods used included:

- instruction
- questions and answers
- scenario based questions
- case studies
- discussion
- exercises, quizzes and tests
- role play
- practise
- demonstration

Workbooks were used for the learners to annotate and keep a record of their learning.



The managers' learning included:

- the regulatory and compliance points
- listening, conversation, communication and observation
- building relationships, empathy and rapport
- positive language, questioning, vocal impact
- what the operators had learned
- observation
- evidence gathering
- feedback
- directive coaching
- record keeping

Similar methods were deployed.

The roll out began with the inbound sales teams with their first and second line managers receiving their own learning programmes concurrently.

All those who received the learning were assessed for appropriate competencies during and at the end of the programme before returning onto the telephones. During the initial period of return, they were monitored for competence and, adhering to the T&C scheme guidelines. The operators and their managers had to achieve and maintain competence before being allowed to work alone.

The process was repeated for the outbound personnel.

The learning assessment took the form of observing the operators receiving a call from a colleague using information provided in case studies. The callers were in a separate room and did not know who they would be calling.

The calls were treated as if they were live and observed by assessors cross referencing the call script which contained the regulatory and mandatory points. The operators had to comply with all the regulatory and mandatory points in the call script and were only marked as compliant if they achieved a faultless call. The T&C Scheme allowed for a re-assessment once the operators had had opportunity to revisit the learning and have further practice sessions within a given time frame.

Similarly, the line managers had to achieve competence in receiving a call under assessment conditions and then further to their management programme in demonstrating their assessment and coaching of their team i.e. to demonstrate their own competence in judging other people's competence. The consultants compiled portfolios of the operators and manager's activities which were presented to a panel consisting of personnel from the board of directors, compliance, quality assurance, the regulatory auditors and the learning intervention team.

The learning intervention team became interim managers of the company's operators and managers during the time these people were attempting to achieve competent status. The consultants then handed over to the company's managers when they achieved competent status and reverted to a business as usual mode.



Outcomes

The learning programme facilitated the transition of inbound and outbound telephone operators from not knowing what compliance competence meant under the new regulations to being competent and compliant in their jobs.

Similarly, the line managers went from not knowing what was required of them under the new regulations to being competent line managers able to assess their team's competence and understand what steps to take to maintain competence.

The learning intervention programme supported the business for nearly twelve months during which time the whole of inbound and outbound, their respective first and second line managers and the quality team had been retrained in line with the new regulations and the T&C Scheme.

The company in question continues to trade and has a demonstrable increase in revenues and customer retention.

New senior personnel were appointed subsequently who have since taken the company to new levels of effortless customer experience.

Feedback

It was felt overall that the learning intervention had achieved the prescribed goals and that it had led to the contact centre personnel returning to full duties at least two months earlier than expected. The learning materials were regarded as excellent and the assessment procedure, safe, robust and compliant.

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**Contact Centre learning intervention
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