



SAMPLE

Call Center Supervisory Training

Needs Assessment Analysis and Recommendations

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Document History

Table (i) Document Revision Record

Version	Status	Date	Author	Notes

Acronyms

- BP Business Procedures
- CIS..... Customer Information System
- CSR Customer Service Representative
- Call Center Residential Customer Service
- SME Subject Matter Expert
- SOP Standard Operating Procedure
- SOW Statement of Work

Chapter 1 Executive Summary

As part of a new training initiative, we were tasked with developing customized training curriculum for the Call Center Supervisory team. In the scope of the project it was stated that the training should include not only technical, but also soft skills training. The Call Center Supervisors will have limited time available to attend formal training, therefore the training must be highly targeted at areas that require the most reinforcement. In order to determine what those targeted areas/topics are, a needs assessment was conducted in two parts. First, using the results of the BPA report from November and December 2019 to extract areas requiring improvement. Second, utilizing one-on-one confidential interviews with each Call Center Supervisor.

The objective of this report is to document the results of the needs assessment conducted, discussing both the findings of the BPA report and the one-on-one interviews. This report includes the findings of technical skills they would benefit from refresher training on, soft skills they currently struggle with and would like training on, the overall climate/culture the Supervisors currently work in, and the obstacles they face that keep them from being successful on the job.

During the week of <Insert Dates>, interviews were conducted with six Call Center Supervisors. These interviews were a means of collecting information on the current state of their job as a whole, any perceived obstacles, or risks that might delay or stall their progress or success, possible causes for those obstacles, and effects expected as a result of those issues if not addressed. Additionally, the participants were asked what training topics would be beneficial for them in order to avoid any setbacks, improve the overall work environment/culture, and help them to be more successful in their roles.

The interviewees for this report were: <Insert Participant Name>

Name	Role
Participant #1	Call Center Supervisor
Participant #2	Call Center Supervisor
Participant #3	Call Center Supervisor
Participant #4	Call Center Supervisor
Participant #5	Call Center Supervisor
Participant #6	Call Center Supervisor

The intended audience is <Insert Name>, Manager - Training with a courtesy copy to <Insert Name>, Director - Customer Experience, and further <BUSINESS NAME> distribution as deemed necessary. The objective of this needs assessment was to ascertain the current technical and soft skill training needed for the Call Center Supervisory team.

This will be the first specialized training developed for the Call Center Supervisors. The interview part of the needs assessment was conducted in a private space to maintain confidentiality for each participant. This sense of anonymity allowed the participants to speak freely regarding their concerns about their own knowledge, job stressors, culture, technical and soft skills issues. All participants were read the same introductory statement making them aware of the nature of project and the process of the interview. Additionally, all participants were asked the same set of questions. (Interview document attached separately)

Introductory Statement

We're doing a needs assessment to help improve opportunities for training and education for the leadership team in Call Center. We'd like to talk to all the supervisor about this, to get a better understanding as to what you need as a team, and as individuals to grow and succeed in your roles. We hope you will find it a useful opportunity to think about what training or personal development you might find useful.

The information you give is confidential. It will not be reported back to anyone in a way that will identify you. I want to ask you some questions about yourself; then about your job; then about learning and development.

The whole conversation should take about an hour. I'll be making notes to help me remember what you say. There are no right or wrong answers. All we want is what you really think.

Would you like to ask me any questions first?

The data was collected through open-ended or task specific questions developed to guide the participant in assessing their competency, comprehension, skill level, and areas needing improvement in each area, rather than to a preexisting theory. The information gathered from the answers given were analyzed to determine the overall areas for needed improvement. Additionally, in the post question comments area, notes

were taken regarding the overall concerns expressed by the participant or observed by the interviewer.

A qualitative content analysis of the interviews was conducted. The interviews were first read as a single document to get a full sense of the group as a whole. Secondly, the interviews were read as individual pieces of data to establish patterns, key thoughts, or concerns. Those patterns, key thoughts, and concerns were then broken down into categories that were representative of the same skill or deficiency. Finally, an analysis of all data gathered was conducted and findings noted and documented.

Initially most participants stated they were untrusting of my intentions and mentioned that they were under the impression that the training was a corrective measure from management due to their poor job performance. The belief that training was being created as a corrective measure tainted their perception of the project in a negative light. However, once the nature of the project was posed to them in a positive light; i.e. training tools to help you succeed; the participants' outlook and responses became more positive.

The BPA report findings are discussed first, then followed by the interview needs assessment findings.

In conducting the interviews, the questions were broken down into five sections:

- Personal
- Job
- Technical
- Policy/Procedure
- Soft Skills

There was an additional section at the end to include any other comments that were pertinent to the study.

The interview section of this report is broken down by each of the five sections mentioned above. Each section is broken down into:

- **Details** – Description of findings for each category
- **Assessment** – Specific data to each category
- **Short Term Treatment Plan** – Immediate plan of action
- **Long Term Treatment Plan** – Recommended strategic, long term plan

Chapter 2 Summary of Findings

This analysis yielded results that were slightly different from what was expected. Though the BPA report findings stated the participants were mostly lacking in technical knowledge of CC&B, and somewhat deficient in soft skills, the interview needs assessment results say the opposite.

Though the needs assessment was designed to look for training needs, there was a secondary branch of findings dealing with workplace culture. There are many factors contributing to the less than optimal performance at the moment. The major obstacle for the participants currently is an overwhelming work load, with little to no support available. They are critically over tasked at the moment leading to higher stress levels, errors, lower morale, and poor soft skills being used. Their environment is open to constant distractions, and their attention is pulled away from their primary tasks constantly. Additionally, they feel that the only feedback they receive is of a negative nature.

As a curative measure, providing a customized training curriculum that is heavily focused on soft skills and provides specialized CC&B technical knowledge would be beneficial. The training must provide behavioral tools and techniques the participants can readily incorporate into their daily performance, and be able to teach to others. Sufficient time must be devoted to in-class practice of these techniques in order to give the participants the opportunity to work through any issues or errors in class prior to performing these new skills in public.

Performance metrics can be observed prior to the training sessions, then reevaluated a month after the sessions are concluded in order to measure the level of change that occurred in the participants. A six to nine month observation and evaluation period is recommended in order to give the participants time to assimilate their new skills into their day to day duties.

Additionally, an effort should be made to restructure the level of workload currently assigned. It is apparent that the amount of duties they are responsible for far exceeds their capabilities at this time.

In an effort to change the culture, changes to the communication between management and staff is imperative. In order to improve morale and increase positivity in the team, positive reinforcement techniques should be employed instead of negative. Language,

tone, and delivery of criticism should be geared to encourage, grow, and inspire change, rather than belittle, instill fear, or focus on only the negative.

The type of change needed requires a shift in corporate culture towards a nurturing, positive, and growth centric environment. By creating a positive, learning, and encouraging culture/environment, the attitudes of everyone in the area will also reflect a more positive outlook.

Culture change initiatives are outside the scope of this project, but should be considered of critical importance and dealt with as soon as possible. The skills taught in the classroom can only help the participants have more efficient tools to employ when dealing with customers and staff. However, if the culture in the department remains negative it will continue to demotivate the department as a whole, leading to poorer performance.

Chapter 3 BPA Report Findings

Part 1

BPA Evaluations Report from <Insert Dates> were obtained from Sales Force. Unfortunately, at the time a full list of the Supervisors was not active in the system, therefore the report is based on the performance of three Supervisors and the rest of the call agents. Based on the findings of this report, there are four areas of concern that should be addressed for further development. These four areas are: technical skills in CC&B, procedure knowledge, soft skills, and communication skills. The report contained 119 individual instances reported that make up these four areas. The breakdown is as follows.

Type	#
Failed to Document	23
Lack of Empathy	10
Negative Statements	10
Failed to Review	8
Grammar	7
Incorrect Info Provided	7
Failed to Offer	7
Lack of CC&B Contact info	7
Failed to Brand	6
No Commitment Statement	6
Failed to Summarize	6
No Info Provided	5
Interrupts	3
Jargon	3
Greeting	2
Slang	2
Condescending	2
Lack Permission	2
Long Hold	2
Poor Listening	1

Technical skills	50
Procedure skills	29
Soft Skills	26
Communication skills	14

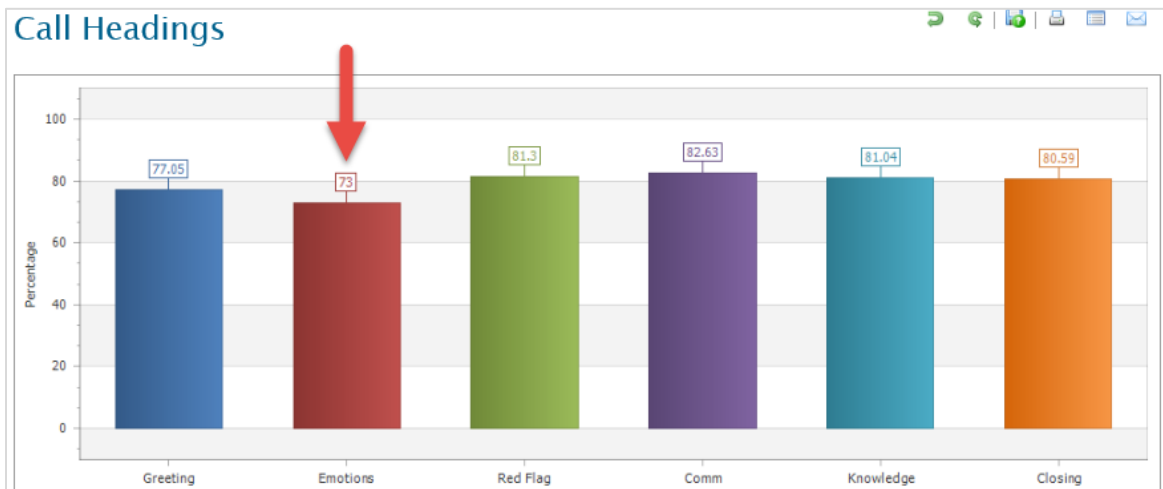
The majority of the technical mistakes were a failure to document thoroughly the interactions in customer contact notes. The next two highest were soft skills: lack of empathy and negative statements.

Part 2

BPA Evaluations Report for December 2019 obtained from direct data gathered by BPA shows improvement in the Supervisor’s performance since October, though the overall score of **74.41%** is still the lowest when compared to Commercial, Nesting Collections, Residential Agents, and Faneuil.

The call headings are listed below with their corresponding overall score for the Supervisory team. Emotions was the lowest score overall for the team as a whole for calls.

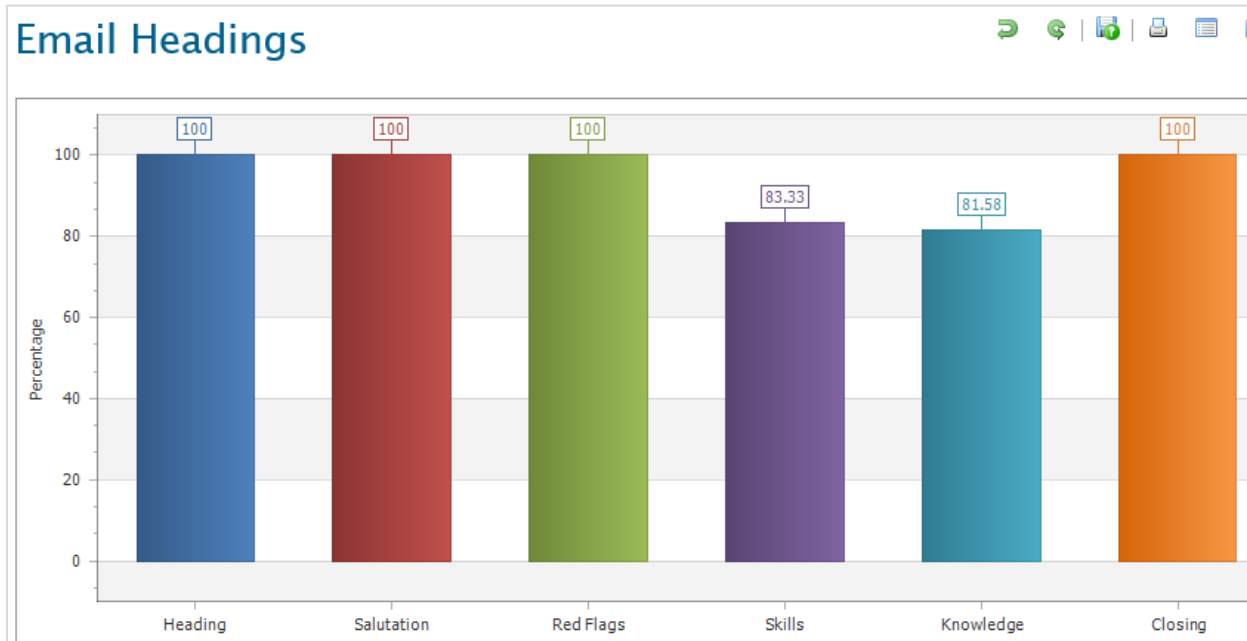
- Greeting – 77.05%
- **Emotions – 73%**
- Red Flag – 81.3%
- Communication – 82.63%
- Knowledge – 81.04%
- Closing – 80.59%



Email headings are listed below with their corresponding overall score for the Supervisory team.

- Heading – 100%
- Salutation – 100%
- Red Flags – 100%
- Skills – 83.33%
- **Knowledge – 81.58%**
- Closing – 100%

The Supervisors scored much higher in their email headings. The lowest score for email headings was under **Knowledge**. However, consideration must be given to the fact that emails are created from templates so the risk for error is considerably lower than calls.



The overall scores for the Supervisor team have been on a steady incline over the last three months of 2019. Their overall performance has shown measurable improvement, yet they still haven't reached acceptable levels. These are combined scores of calls and email headings.

- October 2019 – 51.4%
- November 2019 – 68.25%
- December 2019 – 74.41%

The full report with individual evaluations for each Supervisor is included as an appendix in this report.

Treatment Plan

It is recommended the training focus heavily on the weaker areas of performance: Emotions (Soft Skills), and Knowledge (Technical CC&B, Policy, and Procedure). Heavy focus must be devoted to soft skills development as this area is the lowest overall score.

Chapter 4 Needs Assessment Interview Findings Details

4.1. Personal Details

Description

When speaking with the participants the overall consensus when asked if they received training on how to be a Supervisor prior to taking the position was no. There were a couple of instances where the person completed a course offering called Leadership Essentials, which was a yearlong program on leadership skills. They stated it was a good training, but not immediately applicable to the job. Most of their learning has been on their own and on the job. There was no formal training prior to taking on the responsibilities.

According to the majority of the participants the biggest obstacle to their success that could be remedied by additional training is soft skills. Most people mentioned that they would benefit greatly from learning better communication techniques for speaking with their staff and customers.

Assessment

Average Tenure with <BUSINESS NAME>: 12 years

Average Tenure as Supervisor: 6 years

Training Requested: Soft Skills

Additional Requests: More clarity in expectations of their job

Short Term Treatment Plan

A customized training should be developed to include technical and soft skills training that are geared towards leadership challenges they face. Technical skills are more advanced as they deal with escalations, which often require a deeper knowledge of the system, along with policy and procedure. Soft skills are essential for a successful leader to communicate effectively with their staff and with customers. This initial training project should be seen as the foundation upon which to build upon.

Long Term Treatment Plan

It is recommended that a suite of training offerings be created specifically to address the needs of new and existing Supervisors. The course offerings should be a combination of classroom, videos, and eLearning to allow for more flexibility in time availability.

4.2. Job Details

Description

The participants all exhibited high levels of stress with the amount of additional duties they have lately taken on. Most stated they were not at all clear on the duties assigned, or the expectations set forth. Many expressed that they felt the instructions and expectations changed from day to day so it was difficult to determine if they were doing it correctly. They all spoke about not having enough time in the day to complete the duties assigned in addition to spending time on the floor with their staff.

At times participants stated that when they received feedback from management it was mostly delivered in a negative manner which was perceived by them as aggressive. The overwhelming sentiment expressed by the participants is that they feel like they aren't being heard, nor consideration has been given to the amount of work that is being assigned to them.

Many of the participants stated that their communication skills were lacking when they were speaking with the staff due to being under stress at the time and not knowing how to apply good communication techniques. All participants stated they would welcome more soft skills training so they can better relay information to their staff and customers.

Their working environment is completely open to all staff and filled with interruptions. The Supervisors cannot complete any one task or call without one or multiple staff members interrupting them with questions or assistance for a call. This pulls their focus away from the task they are attempting to complete, which can lead to errors.

Assessment

Average Number of Staff Supervised: 8.5

Biggest Obstacles:

- Conflicting or vague instructions that continuously change
- Unrealistic expectations with regards to time management
- Overwhelming amount of tasks
- Negative reinforcement/communication from management

Assets: All participants stated they work with their staff both individually and as a team effort. They are all very comfortable with coaching/teaching their staff.

Training Requested: Soft skills, time management, prioritization, and delegation.

Short Term Treatment Plan

As part of the training project, special focus will be devoted to communication skills for Supervisors, with special emphasis on effectively communicating criticism, and corrective behaviors.

Long Term Treatment Plan

At a later date curriculum for time management techniques, to include prioritization and delegation of duties should be added.

Consideration should be given to reevaluating their current workload. Currently the list of duties assigned to them has multiplied in the last few months and more seems to be coming soon. A work study should be conducted to determine the time required to complete the tasks assigned, and take into consideration that these tasks will continuously be interrupted by their staff's needs.

Effort should be made to allow the Supervisors to speak to management about their concerns without fear. Currently they do not feel free to speak, as they expect negative reactions to their comments. Soft skills communication training would benefit all levels of leaders and should be considered as a necessary skill to possess.

Overall a culture shift is necessary for the group to improve and thrive. It is recommended that a culture change initiative be developed and implemented. For it to be successful, the changes must begin at the top management level and trickle down. Full commitment is needed from every staff member as changing workplace culture is a difficult and slow process that requires constant effort over a long period of time. Going forward without addressing the negative culture and environment of the team would lead to more turnover and employee dissatisfaction.

4.3. Technical Skills Details

Description

The participants all stated they received CC&B training at go live in 2017 and have not attended refresher training since then. Many mentioned they have been offered the opportunity to attend New Hire training sessions they deem valuable to them, but with their workloads being so high none of them were able to take advantage of this offer.

Most stated they felt confident in their knowledge of CC&B, though they also admitted that there were some areas where they could use reinforcement or more in depth training. They all coach their staff on a daily basis on technical skills, though they admit to not knowing the latest methods being taught in New Hire. They try to keep up with the FTTD emails and make their staff aware, but sometimes it becomes overwhelming with the amount of emails they receive.

Assessment

Initial Training in CC&B: Go Live

Refresher Training in CC&B: None. FTTD communications for updates.

CC&B Training Requested:

- Special Irrigation
- Water leaks
- MDM
- Modifying a start date
- Deposits
- Prepaid
- Chilled water
- Char Prem
- Authorized user
- Audit reports
- Mailing address
- Final inspection clearance
turn on. ETurnon 1
- Balance transfers
- Cancel/Rebill
- Power Pass (reconciliation)
- Saint Cloud - Selecting the
right SA
- Field Activities research
How to determine who did
a disconnect in FAs
- Doing Financial research
on landlords (multi-
premise)

Short Term Treatment Plan

Customized technical training that focuses on the areas they need most reinforcement in, should be developed. By limiting the scope of the training to only those areas it will allow for the normally six-week long CC&B training to be condensed so less time is required. Approximate training time will be determined after the design phase is completed.

Long Term Treatment Plan

A series of short videos demonstrating specific end to end tasks in CC&B are recommended for future refresher training. This self-paced, asynchronous learning provides the participants with the flexibility to access these mini courses whenever they have the time making it more convenient and easily accessible.

4.4. Policy and Procedure Details

Description

All participants found that when dealing with Policies and Procedures, the information in the Call Center manual is outdated and not easily searchable. Additionally, going through emails to sort through FTTDs in an effort to find the one that relates to their current question is very difficult. Often times they have to rely either on each other or other SMEs for the answers, but none of those answers are documented.

Assessment

Are Policy and Procedures Clearly Outlined/Communicated: No

Which resources do you rely on for Policy and Procedure information? Call Center manual, FTTDs, SMEs

Are answers easily found? No

Short Term Treatment Plan

It is recommended to incorporate the updated manuals, which include all information regarding CC&B and Policy and Procedure, in the training sessions. This will help the participants gain the most current information so they are better prepared to coach their staff. Additionally, introducing them to the new format is a good way to test the manuals prior to the pilot being released.

Long Term Treatment Plan

Creating an updated, specialized manual that is easily searchable will be of great benefit to them in the long term. The training department is currently working on development of the Customer Service manual. Additionally, a Supervisor manual will be developed. Keeping these resources updated will be key to providing accurate and up to date policies and procedures.

4.5. Soft Skills Details

Description

With one minor exception, all participants stated that not only did they need training in soft skills, but they are looking forward to receiving it. In the interviews, many spoke about having difficulty in dealing with soft skills especially when trying to coach their staff. At times, the participants had difficulty giving criticism in a way that was direct enough to get the point across, but sensitive enough to not cause the staff member to feel threatened. Additionally, it was mentioned that when doing a coaching session with a staff member, they sometimes feel powerless as there are no real consequences to the employee's poor performance, leading them to feel as if the interaction is pointless. Controlling their body language as a means to not express their frustrations and negative emotions has been an issue for many. They have found it difficult to model the behavior they want to see in their agents at times.

All participants expressed their sincere concern to be better when dealing with their staff and customers, and all stated that they try every day to do what they can to improve. However, they all voiced their need for training in these skills. Overall, their sentiment is that the lack of empathy sometimes shown in their staff may be as a result of lack of empathy in their interactions with their employees. Staff members mirror the behavior they see modeled by those around them. If they see a supervisor that is stressed, showing signs of being frustrated, and communicating in a way that seems too direct or aggressive, then the employees will emulate that behavior in turn.

Assessment

Soft Skills Essential to Your Job:

Everything, biggest emphasis on empathy, and communication skills.

Have you received training in soft skills?

A couple mentioned Leadership Essentials training, but overall the participants felt they have not received adequate soft skills training.

Which soft skills do you find most challenging?

Body language, controlling your emotions, empathy, giving criticism-being too direct or too soft, dealing with irate customers.

What keeps you from using those skills as intended?

Job stress, feeling rushed, no training.

What do you coach your staff on most frequently?

Empathy, avoiding negative words, controlling their emotions.

Training Requested:

Conflict resolution, handling irate customers, addressing behavioral concerns with staff, communicating criticism appropriately, communication skills, body language, mannerisms, sayings-set statements they can memorize, how to talk to a customer, how to show the proper emotions when dealing with staff and customers.

Short Term Treatment Plan

This analysis revealed that the greatest need for training is in soft skills. There are definitely technical areas in CC&B that would benefit from additional training, but the biggest performance gap currently is found in the soft skills area. It is recommended that the training curriculum give major emphasis to this area as to provide the participants with the training they would benefit from the most.

Soft skills training should include communication skills: controlling voice (tone, tempo, volume, and inflection), avoiding negative language, active listening; body language: reflecting the image desired; dealing with irate customers: conflict resolution, de-escalating a call; controlling emotions: showing empathy, using appropriate validation statements, showing your personality, not reacting to an aggressive customer; and effective coaching techniques: how to give appropriate criticism, working on accountability, creating growth plans, modeling behavior. These are a few suggested topics, which can and may change as the training is further developed.

Long Term Treatment Plan

Soft skills training is an ongoing process, and often can go hand in hand with culture shift initiatives. Becoming aware of negative habits, attitudes, communication styles, and/or language can be helpful when wanting to change these towards the positive. Learning these new habits takes time and practice. It isn't enough to provide training for these skills. It needs to be followed up with positive reinforcement, constructive criticism, and growth plans. A challenge to keep improving is always present and should be encouraged. Keep in mind that growth and change aren't always a steady climb ahead. It is to be expected to have set backs from time to time. What is key in these moments is how to recover and help the employee regain their momentum.