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# **SAMPLE SUMMARY REPORT**

## **Supervisory Training**

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**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

**Chapter 1      Executive Summary**

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The objective of this report is to document the results of the Call Center Supervisory Training conducted during <Insert Date>. The first week was exclusively Soft Skills training, while the second was focused on CCB Technical Skills training. The course was scheduled for forty hours per session, broken down into twenty hours per week, for two consecutive weeks. However, during the Soft Skills portion every session ran approximately 30 minutes over the allotted time, even when not performing all of the activities and role plays initially planned.

The participants in this training were:   <Insert Participant Names>

<b>Name</b>	<b>Role</b>
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

This was the first specialized training developed for the Call Center Supervisors. The curriculum was developed based on the results of the needs analysis conducted previously, which included individual interviews and BPA report findings. 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.

BPA Evaluations Report from <Insert Date> 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 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.

BPA Evaluations Report for <Insert Date> 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%

Per the analysis there were two main categories that were selected as areas of focus: soft skills and CCB technical skills. The training was conducted in the computer lab room at Gardenia, which provided a private setting in which the participants could discuss issues openly.

The training was met with some resistance and hesitation at the beginning of the first session, primarily because the participants were under the impression that the training was a punitive measure due to poor performance. Once that misconception was dismissed and the correct expectations set for the classes, the participants became less resistant and more open to the material being presented. The first week of training was focused on Soft Skills training, primarily to address the areas that were found to be most challenging to the participants: showing empathy, dealing with difficult conversations, managing conflict and stress in the workplace, and communicating effectively.

The second week of training focused on CCB technical training skills. Once again, it was focused on the topics that the participants exhibited difficulty with in the BPA assessment. During this week the class was focused on specific parts of CCB policies and procedures. The training was conducted at a high level, though focused attention was placed on specific procedures that needed to be refreshed, reviewed, and practiced for retention.

During both weeks the participants were engaged in their learning. Classes were a combination of lecture, video, discussion, role play, hands on exercises, and class activities. The variety in teaching modalities provided the students with multiple ways of receiving and processing the same information, in order to increase comprehension and retention. The information was presented on two levels. First, the information was presented as personal development for the

students of the skills being taught for improvement. Second, the Supervisors were instructed on how to use the materials as a resource to help them when coaching their staff. The participants were encouraged every day to take back what they learned in class and practice their skills by using them with their staff either by practicing and modeling the behaviors, or by coaching a staff member on how to perform those behaviors or skills.

Class discussions were extremely productive for both morning and afternoon groups. In these exercises, the free exchanges of ideas and debates on real life customer interaction scenarios worked well in encouraging the participants to practice the skills learned while helping each other improve whenever they would stumble. They became more aware of the positive and negative behaviors, language, and even listening skills of their partners, and also became more open to criticism, accepting advice and immediately working to improve their performance. Additionally, as we practiced through the CCB technical skills, once again the groups worked not only individually, but also as teams to learn, practice, and improve the skills taught in class.

Overall the training was successful in providing the supervisory team with instruction in both soft skills and CCB technical skills areas that needed improvement. The participants showed growth in their understanding of the concepts presented, were able to apply the concepts in class, and successfully completed their assessments. However, it was found that the time allotted for the courses was far too short to delve deeply enough into the subject matter, particularly during the soft skills portion of the training. In future, it is recommended that the training time be doubled so that each section, soft skills and CCB technical skills, both have a full forty hour allotted time. This will allow for a more detailed instruction, additional practice time, and more discussion time for the participants.

## **Chapter 2      Summary of Findings**

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Overall, as a group, all supervisors demonstrated a good grasp of subject matter covered, using active listening skills, empathy statements, monitoring and controlling the tone, volume, and tempo of their voice, and avoiding negative language. Additionally, due to their experience with <BUSINESS NAME> they were able to quickly assess the issues with the accounts they were dealing with and sufficiently explain their analysis process and offered viable solutions to the customers. Most did not offer additional programs/services, but all asked if additional help was needed and offered their assistance. All participants took ownership of the issue and completed the call successfully.

When asked about their thoughts on the training provided over the last two weeks, they were complimentary on the opportunity to have training offered to their team. Most found the soft skills section extremely helpful and expressed that they would like to see if offered more widely to all levels from upper management, down to brand new agents. It was stated that they felt the soft skills training was a training that applied to anyone at all departments and many would benefit from it.

The technical training's biggest positive was their ability to see the new Call Center manual. They loved seeing the updated information, the end to end tasks where they could easily follow steps to complete a process, updated CCB screenshots, and most importantly the ease of use. Several commented that the fact they could use the navigation pane/table of contents to navigate and that everything was so clearly labeled made a huge difference for them.

They stated they appreciated the one-on-one interviews prior to the training because it helped them feel like they knew the trainer a little before class. They mentioned that as a trainer I was able to explain the goals of the training in a positive way on the first day which allowed them to trust me and they felt they could be vulnerable and speak openly in class. They appreciated that I took the time to listen and understand their concerns.

### **Chapter 3      Future Recommendations**

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It is recommended that the training time be expanded to forty hours for each of the sections: soft skills and CCB technical skills. The extended time will allow for more discussion time, deeper exploration of the subject matter, and appropriate role play and activity time.

The soft skills portion of the training can be adapted for a broader audience and made available in the future as a training offering. Currently it is customized to fit the needs of the Call Center Supervisory team, however, the skills taught within the material can be adjusted and edited to make them universally applicable. The CCB technical skills, however, are completely tailored to the needs of this specific group of participants, therefore are not recommended for future use.

The following are additional requests for additional training submitted by the participants.

- Strategic Planning
  - More emphasis on advanced goal setting techniques
  - Time management
- Supervisor Specific Skills
  - Targeted scenarios based on BPA issues that Supervisors have to resolve
  - More techniques on how to manage people
  - More conflict resolution
- **Clearly** define their roles better, then teach to each of their assigned duties
  - Define the expectations more so they have SMART goals to achieve
- Get **everyone** together in training at the same time.
  - Find a way to train all Supervisors at the same time so the exchange of ideas can happen
  - It will build a better team
- How to conduct performance evaluations
  - Entering things in the Coaching Portal
  - How to track metrics, attendance, etc....
- The purpose, the process and participate/lead in a RFP's
- Operational Budget - How to prepare budgets. How to adjust budgets during cuts
- Operational Planning... Dealing with conflict resolution- identifying the conflict facts to compromise and collaboration.
- Meeting effectiveness (planning, executing the meeting, to ensure timeliness, productive and effective)
- Operational Strategies - How are they determined for our area
- Effective time management skills in a fast pace environment
- Different management styles
- Decision making skills - The process utilized to effectively make a decision(s)

Feedback submitted by Participant #6.

The following sections that were taught during the soft skills section of this training would benefit from extended time and additional discussion/role play practice scenarios. These classes kept everyone engaged and brought value.

- 1.5 - 1.5.2 (Positivity section)
- How to deal with conflict
- Professionalism with no excuses
- Coaching for success (SMART goal)
- Grow model

**Recommendations made by me to the class.**

- Take 10 to 15 minutes out of each staff meeting to go over a simple refresh of a technical skill, or teach a new skill they have learned in an effort to continue the development of their staff.
- Effort should be made for the Supervisors to work together as a team, rather than individual groups. This will help
  - increase collaboration,
  - improve communication,
  - encourage exchange of ideas,
  - facilitate division of labor in more efficient ways,
  - build a stronger team,
  - and create a unified message for the staff.
- Use the materials provided to help them when they are coaching for improvement and for growth.
- Remember to model the behavior they want to see in others. Be mindful that the way they communicate with each other, with customers, and with their staff, serves as a guide to others as to the expected behaviors they are to emulate.

## **Chapter 4      Soft Skills Training Summary**

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The Soft Skills portion of the training required a lot of personal introspection for the participants. This section covered self-assessments of their styles while dealing with conflict, learning to identify their negative thought patterns, becoming aware of common ineffective communication behaviors, and learning how to control your tone of voice under stress. The topics covered during this training are listed below.

- Exceptional Customer Service
  - Excellence in Customer Service
  - The Service Mentality
- Star Level Communication Skills
  - Effective Communication
  - Listening Skills
  - Tone of Voice
- Positive Mental Attitude
  - How to reprogram your mind for positive thinking
- Communicating Facts in a Positive Way
  - Five Forbidden Phrases
- Six Cardinal Rules of Customer Service
- Six Steps to Service Recovery
- Managing Conflict
  - Managing Stress
  - Workplace Conflict
- Dealing with Irate Customers
  - Managing Difficult Conversations
  - How to Handle the Irate Customer
  - Professionalism without Excuses
- Customer Interaction Quality
  - Email Monitoring Standards
  - Call Support Best in Class Guidelines
- Coaching for Success
  - Setting Performance Goals
  - Assessing Performance
  - Coaching for Improvement
  - Coaching for Growth

During the Soft Skills portion of the training the participants were attentive and engaged in their learning, by being active in class discussions and activities. However, on a few occasions the participants had to be reminded to put away their laptops and to stop doing work during the class. When questioned about what they were doing, most stated they were dealing with emails

they needed to respond to, doing updates on numbers for a required spreadsheet, or preparing documentation for upcoming staff evaluations.

On the first day of training the participants showed hesitation and resistance to the training. When questioned as to why they had a negative outlook on the training before even beginning the process, they stated that they believed they had been sent there to "learn how to be supervisors." This led them to express feelings of resentment, distrust, and animosity towards the training, as to them, it seemed like a punitive measure and meant to humiliate and demean them in the eyes of their staff. On a personal note, I personally heard a call center representative make a comment to another stating the Supervisors where there "to learn to do their jobs because they were terrible at it."

There were mixed results on how the information was being received. The true purpose of the training was explained to the participants on the first day. The message provided to them was that the training was going to provide them with tools, skills, and guides to aid them in performing their job duties. Once the correct purpose of the training was presented to them, the distrust and hesitation waned some. There were still some that approached the subject matter being presented with some resistance. The comments made were along the lines of "this is what I already do, or have been doing forever," or "I know this already," or "yeah we learned this in leadership training before." On the other hand, others were very enthusiastic about the information provided and went as far as giving reports every day on how they went back to their unit and applied the information in communicating with their staff, or teaching them something they learned in class.

Adjustments had to be made to the timing, materials, and videos presented due to time constraints. Classes consistently ran over approximately 30 minutes every session due to the amount of discussion needed to properly explore and explain certain concepts and clear up misconceptions. In order to avoid major delays some activities and videos were skipped, though the information was covered in other ways through discussions and lecture. The time was too short to do extensive role playing. However, some class activities were conducted to allow the participants to practice the skills as they were covered during the week.

At the end of our last session they were asked which of the concepts they learned this week were the most challenging for them and their answers included changing to positive thinking, using the SMART method in writing performance goals for job appraisals, and practicing their communication styles so they are more positive.

The following items were placed on the parking lot as things the team would like to see in the future.

- They would like a dedicated trainer for their Call Center contact center who could provide refresher training courses and do growth coaching/training.
- It would be beneficial to have time each shift to do a 30 minute mini training session before starting a shift.
- They would like Soft Skills training and Service Mentality to be emphasized in the New Hire training.
- As a group they would like a clear and specific plan of action as to when to take calls. For example, Code Red = Extremely High Call Volume, in this case they should jump on the phones to alleviate the hold times.

The participants stated at the end of the first week that they found the course useful and they suggested that it should be offered to all management levels.

## **Chapter 5      CCB Technical Skills Training Summary**

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The needs assessment conducted provided us with a narrowed scope of topics the Call Center team required focus on for CCB technical training. This particular course was tailored to meet their specific needs. Due to severe time constraints only a limited amount of topics were covered during the twenty hours allotted for technical training. The topics covered during this training are listed below.

- Start/Stop
  - Prestart Checks
    - Premise Notes
    - Account Analysis
    - Saint Cloud SAs
  - Person Details
  - Deposits
  - Modifying/Transfers of Service
- Premise
  - Final Inspection Clearance (TUG and TON1)
  - Adding Special Irrigation
  - Field Activity Research
  - Water Leaks
  - MDM
  - Audit Reports (David Meyer-special speaker)
- Billing
  - Cancel/Rebill (explaining a bill to a customer)
  - Balance Transfers
  - Creating a Payment Arrangement
- <BUSINESS NAME> Programs
  - Chilled Water
  - Power Pass
  - Home Utility Report

This training served a dual purpose; to refresh the team on the specifics of these tasks as they relate to policy and procedure, and to introduce them to the new Call Center Manual. In introducing them to the new Call Center Manual it helped them see the new formatting, the updated look and feel, how to search/find necessary information, how information was organized, and a first look at the updated content. Additionally, as we covered each section the participants offered feedback where appropriate on corrections or enhancements to the material being covered.

Unfortunately due to the limited time and large amount of content, there wasn't extensive time for hands on practice. However, we worked as a group through exercises and the participants took turns in performing the processes being taught in class. On Wednesday, we had David Mayer as a special speaker and presented on Audit Reports for the class. His presentation was very well received by all.

All participants were highly engaged in discussion and provided real life examples of customer issues they have dealt with. The lessons were a combination of lecture, discussion, role play, and hands on practice. The course was designed as a high level overview, covering the specific areas where most of the Residential team's BPA errors were reported. The information provided was both a refresher on the process, and also an introduction to our new Call Center manual with the updated materials to learn how to search for the information.

The concepts were presented directly from the updated Call Center Manual. Customer interaction scenarios were used as the basis of class exercises. Initially participants worked together through the issue in an open discussion format as we worked through the process of accomplishing the task being taught. Finally, the participants took turns working through an exercise as the others watched and learned from the individual interactions.

The overall reactions from the group to the new manual were mixed. Most were happy to see the new format and found it helpful that it contained everything in one place. Some raised concerns that the agents having to read through an entire procedure step-by-step might be too time consuming. However, when I questioned what the alternative be if the agent didn't know how to do the procedure, they couldn't find an alternative. In the end, the point was made that initially the agent might find it slow to go step-by-step, but this would only be temporary as they would not need to do this every time. Additionally, without the aid of the entire procedure outlined for them, they would have to try to guess at the steps and the likelihood of errors being made was much higher. In either case, the time on the phone would ultimately be about the same.

As a group, they were attentive, engaged, and interacted well with each other during class. They demonstrated adequate knowledge of CCB navigation and understanding of policy and procedure. In a calm and safe environment like the classroom, they were able to think clearly through any issue, use the skills learned from both weeks to help resolve the customer's issue with success.