

Call centre problems - a matter of psychology?

With call centres increasingly becoming the front line in customer service, the recruitment, training and management of staff is an issue that affects everyone. Business psychologists Kaisen Consulting* spent six months researching call centre operations – and the results make for some startling reading.

As more and more companies choose to conduct key aspects of their business over the telephone and the number of call centres nationwide mushroom, so too do the problems. With the rise in call centres has come an increase in criticism from staff about working conditions and complaints from customers who are concerned about low performance levels. In extreme cases there has been industrial action, and business is being lost.

Yet our research – carried out in association with multinational clients in the banking, retail, telecommunications, holiday and utility sectors such as British Airways Holidays and the Hyder Group – showed that by far the majority of the call centre staffing crisis and performance problems are caused by fundamental flaws in the recruitment, training and management of staff.

Observation showed that, from a psychological point of view, some of the problems are predictable. And if they are predictable, then they are often solvable or at least manageable.

The research concentrated on the selection, training and management of staff; it reported on common practices across the industry, evaluated the success of those practices and identified where improvements could be made.

Selection methods

The findings showed that call centre selection methods tend to rely on agencies and newspaper advertising but these have inherent problems. Ads are typically over-specified, thereby reducing the pool of available candidates and deterring those who could be very good. Often the ads demand experience, characteristics or qualifications that are 'nice to have' but not essential

to performance in the job, thereby ruling out people with potential.

We also found that the use of agencies is most successful when the client organisation is highly specific about the candidates it is seeking and when agencies are closely monitored. Service levels improve when clients complain or give specific feedback to the agency and make longer term commitments to the agency through preferred supplier relationships, etc.

Too many people are recruited on the basis of characteristics associated with good sales performance – young, energetic and extrovert. But these are the very people who quickly become disillusioned with the job's lack of face-to-face contact, limited variety, rigid performance requirements and poor promotional prospects.

Call centre managers should be looking to recruit people with 'caring' characteristics, rather than 'pure sales' people. Those who succeed as call centre operators tend to enjoy helping people – even in thankless situations – are not competitive by nature, appreciate structure to their job rather than feel constrained by it, and are tolerant of repetition and the clearly defined parameters by which their performance is measured.

Though some personal qualities are often specified by recruiters, there are a surprising number of omissions – motivation, the ability to do several things at once, empathy and emotional resilience for example. Specific motivation for call centre work is probably the biggest determinant of attrition. The ability to multitask is also essential, as is being able to identify with callers and the ability to cope with the wear and tear of handling complaints from the general public.

One-to-one interviews are typically the most common assessment method of candidates. Yet these often fail to measure the factors that they are intended to measure and are notoriously unreliable as a way of determining whether someone is fit for the job. Nor are they always cost effective.

Classically, candidates are 'enthused' about the job and given a 'hard sell' about the upsides of working in a call centre. Yet the research shows that if people's expectations are managed by telling them about the downsides of a job, they start their employment with their eyes open. There is less psychological adjustment to be made and this has a direct effect on rates of attrition.

Training methods

But it is perhaps on issues of training where call centres fall down most. It is given a high priority and taken seriously, but is often limited in its effectiveness. Traditionally companies have an induction scheme which lasts one to four weeks, comprising one to two weeks on product knowledge, systems and operation of equipment, but only one or two days on so called 'soft skills' such as sales and customer service, which are essential to success in the job.

Training tends to be carried out in the classroom rather than in context, thereby reducing the extent of learning transfer – it is different doing something in a training session than it is in real life. There also seems to be little systematic evaluation of trainees' learning progress, yet knowledge of results is key to learning quickly. How can you improve if you do not know what to do better?

By far the biggest training problem however, is the modular step-by-step approach taken by most call centre trainers. Skills are 'deconstructed' in an attempt to aid learning, but this is itself incongruous with the multitasking environment of call centres. Training needs to be holistic rather than being undertaken in separate elements. The actual skill lies in being able to do everything at once, smoothly, like operating the separate controls on a car.

Team leaders

The research also looked at the role and performance of team leaders in call centres, who typically manage a group of between ten and 25 operators. Their success is judged on the targets achieved by their team rather than on the quality of their management. This is a major factor. The more sophisticated the IT, the more team leaders tend to focus on the numbers rather than on the people as individuals. Yet high moral and low attrition appear to be present where there is less emphasis on numerical targets and more emphasis on the development of individuals in the team.

Team leaders recognise that motivation is a key element, yet their motivational techniques tend to be superficial rewards rather than intrinsic reinforcers that signal that people are valued for their competence. Close targeting and measurement of activity

by team leaders typically reduces the individual's empowerment, and control is potentially de-motivating. More autonomy leads to greater motivation and personal initiative.

Traditionally the best operators are made into team managers, but this too can be a mistake. Those who flourish as operators rarely make good team managers, because they do not want the responsibility or pressures of looking after a group. Team managers also need to have a nurturing or coaching quality that enables them to bring out the best in the group.

Performance measurement

It is the ongoing management of call centre staff and the environment within which they work that calls for the broadest reaching reviews however, with technology, performance targets and quality control measures often proving more of a hindrance than a help. Common measures of performance include numerical factors such as call duration/average handling time, sales achieved, conversion rate, percentage of calls answered within a set time, calls per hour or day and sickness/absence standards, together with the recording or monitoring of calls for feedback to operators on quality issues such as rapport and professionalism. Monthly reviews, annual appraisals, mystery shoppers and customer surveys are also employed.

There is a considerable variation in

the way that these targets are applied, from working within broad parameters to very narrowly defined standards and targets. Contrary to their aim, the measures often tend to be about activity or process rather than outputs.

Technological advances

Advances in technology sometimes means the data manages the workforce rather than being used as decision support material. There is a trend within call centres to measure activity such as the length or frequency of calls when really it is the output or end result that matters. Not only is this demoralising and dehumanising for staff, but it is also counter-productive. The other danger with sophisticated IT systems is that they automate the job to a level where people are encouraged not to think for themselves – calls are diverted through state-of-the-art telephone systems to ensure that certain people handle only certain types of calls. But as customers are not as regimented as phone systems, the operators can find themselves ill equipped to handle some queries. The more that a person's work is structured and dictated by technology or managers the less productive he or she becomes. This results in both poor customer service and disenchanting employees.

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Recommendations to boost staff performance

Our research into call centre recruitment, training and management policies and practices resulted in a number of other specific recommendations to boost performance and minimise staffing problems, these being:

- undertaking daily buzz meetings, which are both motivational and information giving
- having surgery hours – one-to-one question and answer sessions with a senior operator at set times to answer specific questions
- Communication of the top ten questions and answers to everyone from surgery process
- Providing an on-line database of terms and definitions
- Establishing crisis teams – pools of people who are call centre trained and can be called upon during periods of peak demand
- Establishing SWAT teams – teams of people to deal with particularly difficult calls
- Undertaking team consultation and decision over staff holidays
- Providing operators with a map of the whole product portfolio
- Product rotation – moving people from one product area to another (especially new joiners)
- Cross team rotation – changing the composition of teams from time to time so that people get to know others from across the whole call centre
- Undertaking secondments from the rest of the business into the team leader role.