Through the Ask E Source service, included in annual memberships, you can ask our experts questions related to any of the subject areas your organization subscribes to. What follows is an example of a typical Ask E Source question and answer. Responses can take various forms—for example, we might send you an email, call you, provide a written response, or create a spreadsheet.

## HR Best Practices for Contact Centers

*Eryc Eyl*

### QUESTION

**What are some best practices for hiring and retaining contact center representatives, conducting related personality testing, and transitioning new hires out of the training environment?**

### ANSWER

With the high direct and indirect costs of employee turnover in contact centers, hiring and retaining good customer service representatives (CSRs) is a high priority for utilities that are conscious of costs as well as customer experience. Best practices have been identified for hiring, training, nurturing, developing, and engaging call center agents so that they deliver maximum value to the organization.

#### Selecting Candidates

Finding and choosing the right people to answer the phones is a challenge for every contact center manager. Jeffrey Daigle, senior research analyst at E Source, is the former North American customer service manager for a large global footwear retailer. He emphasizes that his primary focus in hiring was to look for personality traits like empathy and "willingness to help." The hiring process involved an automated interactive voice response system evaluation that allowed the company to evaluate a candidate's voice and style. Face-to-face interviews included scenarios designed to elicit desirable traits in candidates. Daigle collaborated closely with the recruiting staff on the hiring process. Recruiters were required to attend new-hire orientation and to work one week per year on the phones to maintain a clear sense of the position. To ensure that those hired stuck around, a key part of the hiring process, according to Daigle, was being very clear and honest with candidates about what the contact center job was really like.

Maureen Russolo, senior director of consulting at E Source, was previously director of customer service at a large Canadian health and dental benefit company and manager of customer relations at a large natural gas utility. She worked with union representatives to postpone seniority until the representative had worked 400 hours. This allowed the company to bring the rep in on a probationary basis through hiring and the "nesting" phase (where new hires transition out of training) so that there was ample time to determine if the rep was a good fit.

#### Personality Testing

Using personality tests in the selection of CSRs has become quite common, but they are not without their challenges and shortcomings. Personality tests used in hiring should be scientifically validated and correlated to job performance for the specific role being filled. If the test worked well previously, but is now getting poor results, human resources (HR) and hiring managers should determine if the job itself has changed materially. If so, a new test might be needed. All tests should also be evaluated for the ability to "fake" a specific result, as this can affect hiring outcomes as well.

While she was director of customer service, Russolo collaborated with HR and an outside agency to develop a multidimensional test that looked for customer focus and what Russolo calls, "fire in the gut." Russolo emphasizes that the test was just one part of a multistep tollgate process that included situational and behavioral interviewing and job simulation.

Personality tests tend to be more reliable at screening out undesirable candidates than they are at identifying those who will excel. Once a CSR has been hired, managers should use personality test results to inform management and coaching styles.

Some opt not to use personality tests. Instead, you can analyze the attributes of the contact center's top-performing agents and then work with HR to screen candidates for those attributes.

## Training and Development

Call center reps generally receive three to six weeks of training. In companies that are serious about customer experience (CX) excellence, this training includes company-level information—such as vision, mission, goals, core values, top-level success metrics, a review of the company's products and services, brand promise, and attributes—and overall CX strategy. Job-specific training includes key contact center policies and processes, an overview of metrics and the quality assurance process, any systems and technology required for the job, and general customer service and communication skills.

Russolo's agent training included time for agents to listen in to live phone calls with expert agents before agents received any formal training on taking calls. Quality coaches also observed agents during training classes to identify red flags, fit issues, or additional training needs that the trainer might not notice. In extreme cases, this enabled the company to terminate a CSR while still in the probationary period.

In his contact centers, Daigle took a very structured approach to bringing new reps onto the floor and into their "nesting" period. Each had a schedule, including breaks, synchronized with an experienced agent who could act as an informal mentor. Initially, reps were trained and assigned to one type of touch (phone, chat, email, etc.) or to certain types of cases (such as bill payments or other straightforward transactions) until they achieved confidence and competence. The center had a "gamefied" approach to agent development, in which agents "earned" new touch or case types by "leveling up" on call volume.

Daigle points out that assigning new agents to a direct supervisor can provide an opportunity for the new employee to build a lasting relationship and understand long-term expectations. However, this scenario can cause agents to focus on call statistics and experience less empathy from the supervisor. On the other hand, assigning new reps to a nesting supervisor gives them the chance to learn from someone who is skilled in supporting the transition into the center. This was the approach Daigle took, nesting new agents with a nesting supervisor for their first three to four weeks on the floor. During this time, supervisors were mandated to provide two to four minutes of feedback to every new agent on a daily basis.

Russolo nested four new hires with a seasoned agent mentor, which gave the new hires the chance to feel like they fit in, give feedback, and raise questions in a safe environment. This approach also acted as an effective engagement and training tactic for the seasoned agents. New agents received reviews after 100 to 120 hours, and then again after 400 hours, at which point the final decision to retain or dismiss the agent was made. During this probationary period, agents were not evaluated on standard call center metrics or statistics. These were not brought into the performance evaluation until the rep had been on the phones for three to four months. This was intended to give the agent the chance to adjust, adapt, learn, and focus on providing good customer service before worrying about productivity.

Training does not end with the new hire experience. Contact center agents receive training on new products and services, new initiatives, advanced communication skills, sales skills, negotiation skills, time management, stress management, work-life balance, and other skills that increase the employee's value and engagement.

The complete response contains additional resources for members of the *E Source Corporate Communications, Customer Care,* and *E-Channel Services.*

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