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People: [Emma Warrillow](#)

Training the Call Center Rep

The evolution of an organization from product-siloed to customer-centric doesn't happen overnight. It takes a complex combination of actions that come together through effective planning. And nothing is perhaps more critical to the success of a CRM plan than educating and training the staff. However, this is one of the most overlooked and underestimated elements of CRM plans.

"Historically, training is an afterthought," notes Jim Colizzo, senior director, learning and collaborative services for Dendrite, a provider of pharmaceutical CRM software and services. "Training is where people look to save money. In my opinion, this is a big mistake." In fact, reducing training costs is a false economy. "When an appropriate level of investment [in training] is not made, we see it in calls to the call center; and costs [actually] go up." Dendrite observed this firsthand at its own customer-support center, which handles client calls about its software.

Colizzo estimates that a company should set aside five to 20 percent of its total CRM budget for training, and that those near the top end are typically more successful. Dendrite insists that its customers—who include Mead Johnson, Pfizer, Bayer and Astra USA—consider training an integral part of the project, and that the project-planning process includes this component. "You are never going to get the ROI you anticipate if you don't have effective training," says Colizzo. And this must take place across the entire organization—from the call center to the sales force and throughout the management ranks.

The "face" to the customer

Customer contact centers in many organizations are often the only place the customer interacts with a live person. Ensuring that agents—traditionally the lowest paid and least trained face of the company—embody the new philosophy toward customers is no easy task. Training in the contact center should involve new technology and processes, as well as new metrics. It also involves a considerable change in focus. If anyone knows about call centers, it is Mike Trotter, executive director of Purdue University's Center for Customer-Driven Quality.

In his pursuit to better advise companies, he visits more than 40 call centers per year. The center's mission is to research and educate them about access-channel management—that is, the routes by which a customer interacts with an organization. [Editor's Note: At 1to1 Magazine, we call this Touchmapping—tracing all the points of interaction from company to customer, with the purpose of better understanding those interaction routes and improving upon them.]

Trotter observes that most organizations learn as they go through the CRM transition. And those that "fly by the seat of their pants" to a degree usually need to revisit their CRM budgets and add 30 percent more to their training costs. "They're missing the mark by that much," he muses, adding that most organizations are good at scheduling time to do technical training....but sometimes that means they put software in place over bad processes," notes Trotter. He has seen "up to a 50 percent increase in talk time" due to the automation of bad processes.

When this is the case, companies find themselves in need of further training; but, says Trotter, often "this new training was not budgeted, so literally, they don't train [the reps], assuming 'they'll figure it out.'" Ultimately, "It's the customers who become frustrated," he says.

Successful training starts with the process

When you start with the process, people learn not just how to use the technology, but how to use it to do their jobs more effectively. And not only should training start with the process, but so should the entire CRM project.

"You have got to get inside and see the processes currently in place before you even begin to change the technology," he recommends. You need to analyze the activity at the call center and ask who is calling you. "If you don't, what is technology going to do for you?" At companies that understand the need for training, according to Trotter, "Management is thinking about [what's best for] the customer, not how fast the [customer interaction] can be."

Classrooms of the future

The word "training" typically conjures up images of chalkboards and rows of desks. Today, companies are exploring a variety

of different approaches to transmitting knowledge across the organization. Like Honeywell in the related story on page 36 ("Flying To New Heights"), progressive organizations are utilizing new technology.

Dendrite promotes a "learning continuum," blending face-to-face and e-learning to its clients. By completing an e-learning module before they come to the classroom, "they have the basis for what we are doing-this means a higher level of effectiveness to start, and that shortens the face-to-face time by one-half to one full day," says Dendrite's Colizzo.

When you consider the cost of taking large numbers of salespeople out of the field, this can have a significant impact to the bottom line. In fact, Bristol-Myers Squibb Co. recently announced an agreement with Dendrite to train its entire U.S. sales force of 4,000 reps, managers and home-office personnel exclusively through the Web.

While the staff will still complete their training during office hours, it means far less time away from selling. A typical three-day classroom-training course, with travel time, can result in five days of lost sales opportunities. With e-learning, while Dendrite recommends they set aside five days, only a portion of those days actually involves training. Reps can make sales calls during their free time.

Dendrite is doing some studies now to understand the retention rates of Web-based learning versus traditional classrooms. Colizzo says that, so far, they have noted no decrease in retention for Web-based learning and expect to see a slight increase in effectiveness.

Creating change agents

For an organization to truly change, the vision for CRM must come from the top and must be spread throughout the company. In addition to training the frontline people to think differently, employees in all areas of the organization must shift their thinking. This new thinking must become part of decisions made at every level.

A number of organizations, including Digital Consulting Institute (DCI), Customer Relationship Management Association (CRMA) and The Association for the Advancement of Relationship Marketing (AARM), have recognized the need to educate internal leaders, as well as sales and service folks. A number of certification programs have recently been developed which aim to provide managers and team leaders with the necessary tools for transforming their organizations.

The Customer Relationship Management Institute (CRMi) cites the need to create "change agents" in strategic locations throughout the organization. These staffmembers need to truly understand CRM and know how to make it work. "The key is to take strategic locations and get people from top to bottom who understand this stuff," says Bob Stacey, executive director of AARM and head of CRMi. CRMi offers a CRM Certification (P.CRM) program aimed at training managers to develop the leading edge tools to successfully implement CRM. Graduates of the CRMi program include representatives from 3M Co., Sears, TD Canada Trust and Toyota.

The CRMA, another body that offers a CRM certification program, believes "you need to create new types of people," says Laura Pollard, executive director. "Organizations must be conscious of the fact that they need to transform themselves into learning organizations."

While there is considerable debate about the value of certification itself and the differences between the various curricula, it is clear that educating managers in a customer-centric environment is as critical as training the front line.

The metrics of change

While no one denies that training and education play a vital role in the CRM transition, just how important they are is difficult to measure. The effectiveness of training and the value it has to the organization is complex to assess and difficult to disassociate from the impact of the software and other related changes.

Trotter advises that you begin with a snapshot of the organization-all the metrics you measure today. When bringing new CRM software to the contact center, he recommends you look at these measures before the installation and then again, four to six weeks after. He cautions, "Expect to see a spike in talk time and call-handle time."

The biggest problem most companies face is that they try to put in place different processes, but continue to measure in the old ways. Trotter says you must measure the things you are training in, and gives the following example: "If you want new technology to reduce talk time, you need to train on how to reduce that talk time. Often this software results in longer talk time, because there is more to talk about." In fact, CRM may mean putting aside emphasis on metrics such as call time and talk time, in favor of measures that capture the essence of the new roles-customer satisfaction and cross-sell ratio, for example.

For contact centers, he recommends looking at 'schedule adherence' and 'occupancy,' along with customer satisfaction. Schedule adherence is the percentage of time agents are ready to serve-and should be 90 to 92 percent. Occupancy is the measure of time they are actually serving customers and is a function of how busy the call center is. No matter how it's

measured, it's clear that effective training can make or break your CRM success, and should not be underestimated.

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