

The call/contact centre trainer as change agent: or ensuring that the conditions are set for your delegates and centre to flourish

Abstract

Call and contact centres regularly provide training programmes for their staff, yet often overlook vital links between their organisation's culture and its infrastructure - links which, if acknowledged and worked with, can significantly influence the achievement of both learning objectives and commercial outcomes.

In this article common organisational issues and the role of the trainer as a catalyst for change are explored. An eight-step checklist is put forward as a guide for assessing whether your call or contact centre will benefit from implementing a proposed training programme. Pointers are given on how to deal with the personal and corporate challenges attached to widening the boundaries of the training brief.

Introduction

A change agent or members of a change team are usually used to assist management to support implementation of activities or projects across an organisation. They are an extra reserve of skill and expertise that staff and management can draw upon to help in resolving challenging situations. Their role is often necessarily un-focused and involves them reporting to the most senior levels of the company.

The presence of a change agent within an organisation suggests that management has considered some of the wider difficulties in achieving a stated objective and possibly the work involved in crossing functional boundaries.

If the change agent's brief is open ended they are obviously well positioned to use a range of diagnostic tools including questionnaires, one-to-one interviews, and focus groups to survey managers and canvas opinion and identify the key issues the organisation is facing.

The dilemma for many call/contact centre trainers brought in to deliver a single training module or an entire training programme to staff is how to address issues when they are discovered once the programme is underway or a project has started.

Whilst arguably it is the manager's or project sponsor's responsibility to ensure that conditions are favourable for the implementation of training initiatives, in reality, perfect scenarios rarely occur. Business constraints, operational pressures and the fact that call/contact centres are dynamic environments staffed by human beings means that a range of complex issues are likely to come into play.

The call/contact centre trainer is required to engage with the organisation and its issues in order to increase the likelihood of successful identification of needs, and design and take-up of their material and methods.

So what are the types of issues likely to be encountered by the trainer and what are their sources? Their nature may be social, economic, psychological or political. They may be generated by sources internal and external to the centre. Our experience at dancing lion training & consultancy has repeatedly shown, if these are not addressed when identified at an early stage, (such as in the initial sales appointment, client briefing or early planning/training design sessions), they are likely to surface later as issues that delegates carry with them into the training programme. If these are not addressed at this early stage there are significant financial implications which are examined below.

The business case

Merchants Ltd's recent Global Contact Centre Benchmarking Report tells us that agent turnover has nearly doubled over the past two years to 32% globally. Income Data Services Ltd in 'Pay and Conditions in Call Centres 2001' reports from a survey of 139 organisations with 310 call centres in the UK that staff turnover was running at 22%. As this figure has risen at a rate of 2% year on year since 1999, it seems reasonable to assume that recruitment, training and development of staff will be an ongoing requirement for most centres.

The cost of recruiting new staff and the 'lost opportunity costs' associated with the period where old staff leave and new staff are recruited and trained are high. Figures of £1.1 billion per year for the UK industry alone have recently appeared in Call Centre Focus, an industry trade magazine. Interestingly, and perhaps not surprisingly research by dancing lion training & consultancy suggests that many of the organisational factors affecting staff attrition also impact upon call/contact centre training strategies and implementation.

Estimates for training costs vary. Training Strategies for Tomorrow recently printed that an average call centre employing 100 people can now expect to spend about £28,000 on training new staff each year. Whilst further investigation is required to find out what these costs comprise of, training programmes in call/contact centres now cover many areas. They can include initial induction to company, industry and department for new recruits, computer, telephony and internet training, product knowledge, management and supervisory skills, customer service and communication skills, as well as legislative and specialist modules. It may incorporate a range of learning methods including classroom, outdoor, distance or on-line.

Given the investment quoted above it is useful to consider how that value can be maximised upon. For many training practitioners this may require taking a broader, more systemic approach than is usually adopted.

Factors affecting call/contact centre training implementation: what issues are likely to be confronted?

The catalogue of potential issues that could be faced is of course wide ranging. Therefore those provided here are not put forward as a definitive list, but some I've found are frequently occurring. They are offered as discussion points with which you may be able to identify from your own experience.

Growth of the industry and its impact upon staff recruitment

As other industries such as manufacturing decline, we've seen call/contact centres continue to grow. Recent estimates put the total number of centres in the UK at 5000, employing approximately 450,000 people. This means that many people are entering the industry coming from different backgrounds where capabilities other than customer service, computer and communication skills may have been valued.

Too often staff is assumed to be able to communicate effectively, have reasonable interpersonal skills and are subsequently given the minimum 'soft skills' training. In my experience this is true of both public and private sector organisations including some providers of outsourced telemarketing services, who one might expect to perform differently. Those working to short deadlines, tight budgets and recruiting staff without adequately briefing employment agencies can often find themselves hard pressed to represent themselves and their clients to the required standards.

Nature of the work and management style

Staff has told me they frequently find call/contact centre work repetitive, at times intense, (such as when dealing with irate customers) and at other times plain boring. Many graduates are recruited by blue-chip multinational companies directly from University with no concept of practically what a customer facing call/contact centre job will involve. Job descriptions may be presented in an aspirational way, by well intentioned managers or HR personnel leading to unrealistic staff expectations. When these are unfulfilled discontent and scepticism emerges. When reinforced with negative personal experiences and stories related by longer serving members scepticism can easily develop into cynicism. These feelings are accentuated when mission statements and promotional material for customers all espouse high values and management presence and communication is poor.

Desensitised to change and its effects

Whilst some centres are expanding, others are rationalising operations 'downsizing' or making redundancies. In times of change it's common for management concerned with strategy or meeting corporate targets to discount the emotional reactions of staff. With

changing working environments that can include new teams, increased workloads and more systems to learn, staff can feel alienated and simply adjust to 'going through the motions' of their job, performing at the minimum level to justify their salary, rather than functioning as a dynamic and motivated members of the team.

Specialised product, systems and company knowledge as well as working relationships all take time to build. The acquisition of these elements and the time necessary need to be factored in to any change initiative. Frequently these aspects are not fully considered.

It's also all too easy for staff to find themselves reassigned to different projects where conditions of employment are no longer what they agreed to when originally hired. If major changes have occurred it's risky to assume automatic acceptance of contracts.

In instances where new teams are regularly formed and broken up, monitoring staff development becomes difficult. Information is invariably not passed on and recognition of individual achievement can be overlooked in the pursuit of short-term group targets and service level agreements. I have found that when an individual ceases to perceive themselves as developing, or management caring about their progress over and above their part in securing the company's financial targets, willingness to commit oneself to the company cause soon disappears, particularly if the staff member can recall strong memories from the company's history when they were treated differently. Because of this the trainer should be wary of providing skills training which may be commissioned following a merger or acquisition. Whilst such events can help with increasing teamwork, unless adequate steps have been taken to foster new acceptance and an experience of joining the new organisation, there may be much excess baggage to deal with.

Similarly, in this climate any staff monitoring system introduced is unlikely to produce the desired effect. Even if it's intention is to identify high and low performers to reward and assist them it can quickly become reduced to something that's completed to appease management, another component in the mandatory company appraisal process, or solely as a possible justification for an increase in the annual pay review.

Remuneration

My research has shown that paying staff a high salary without considering other psychological and cultural aspects of the working environment doesn't necessarily guarantee higher standards of customer service, sales productivity, openness to learning or staff retention. In some resource rich organisations customer facing staff with high levels of technical expertise or product knowledge have been bought with high salaries and essentially hold the rest of the organisation to ransom. Poor interdepartmental communication, non-cooperation and inflexibility may be tolerated because it is expedient to do so. Invariably this breeds resentment in other staff that do not enjoy the same privileges who sense and react to the injustice of double standards.

This should not, however, be regarded as a justification for paying the minimum salary and not investing in call/contact centre staff. At the opposite end of the pay spectrum I've watched organisations open centres in areas of high unemployment purely to take advantage of lower salary bills. Adopting a 'treat 'em mean and keep 'em keen' philosophy can lead to paying more in recruitment and operating costs as staff leave, taking their transferable generic skill-sets to better paid positions elsewhere. A study quoted by Contact Centre Recruitment and Training in October/November 2001 estimates that an average cost of £1200 is incurred in recruiting a person but a loss of approximately £1400 results for the company if the person leaves shortly after recruitment.

Unclear commercial objectives

Most training programmes are commissioned to help achieve the business objectives of the host organisation. If they are not, you may well question what useful role they are performing and how they were authorised. Most professional trainers, whether employed full time by their centre or commissioned as an external provider will be familiar with the training cycle. This comprises of the following stages: identifying training needs, setting training objectives, setting methods of validation and evaluation, designing the training programme and carrying out validation and evaluation.

It is one of the trainer's responsibilities to ensure that the training programmes' objectives are specific, measurable, achievable, results-oriented, time-deadlined and understood and agreed by all. It's also obviously necessary to consider how the training content will facilitate the achievement of the training objectives. In some cases training needs analysis will have been carried out using the above cycle prior to deciding on the content of a training programme. Where the training cycle has been used it is vital to clarify definitions, terms and the rationale for proposed solutions, particularly if different people carried out the data collection and analysis. Doing so will ensure that everyone understands each other's perspectives and training, industry or call/contact centre jargon hasn't been used unwittingly or otherwise to create multiple meanings.

Inter-departmental conflicting objectives

Whilst much thought is typically given to the business and training objectives what can often be discounted is how internal departments interfacing with the call/contact centre can affect the service delivery and customer experience.

Consequently, any new training material or technique presented to improve individual skill levels whilst those conditions operate is likely to be greeted with considerations and objections by staff as delegates. For example, it is common for customer service representatives to have targets based on resolving complaints within a set period and to contact the customer with regular updates on progress. I've found that a frequent cause of customer dissatisfaction is where 'the case' is handed off to colleagues in other

departments who are not goaled or monitored by the same metrics. In some cases, they may even be in direct opposition. For instance: an adviser pursuing high statistics in 'the correct solution given to a customer's problem first time', contrasted with a colleagues goal of 'achieving the fastest resolution of the enquiry'. As a result, staff may not be driven to perform in the same way. Add a few other differences to the scenario, such as differences in length of service, discrepancies/differences in pay, back logs of work to name just three and it's easy to imagine how an 'us and them' and 'blame' culture can develop.

Resistance to change

The term 'resistance to change' can be used too quickly to generalise about a host of difficulties an organisation may be facing, whilst suggesting that it is somehow individual staff members holding up corporate progress. Of course, human beings may become attached to past ways of working which have been successful for them and some staff can become involved in trying to demonstrate that 'they know best'. However, it's my experience that much of the 'resistance to change' usually apportioned to staff in new learning situations can be reduced if surrounding issues, such as these are addressed beforehand and a consultative approach is used to contract with individual staff members.

In many of the issues described here, both the original employment contracts and psychological contracts of staff have drastically changed, without being explicitly acknowledged. Not surprisingly there is discontent and confusion, which many corporate cultures seek to suppress rather than resolve.

As a general rule of thumb, the greater the degree of change in the organisation's strategy and operation, the greater the need for management to provide direction, reassurance and listen and act on staff's concerns. The trainer should therefore identify the nature of the organisational changes taking place, (planned and unplanned) and how these are likely to impact upon the staff and the training programme. Are they transformational/radical or incremental? (Transformational or radical is defined here as changing beliefs and attitudes as well as behaviours, processes and support structures. Incremental change is often a more gradual process, which tends to focus on behaviours and infrastructure.) A key question for the trainer/change agent to ask is: how are management planning to support staff through the changes?

Managers may be unaware of the depth of staff's feeling about organisational issues.

Depending upon how involved the manager is with the centre and its staff will determine how much they truly understand about their concerns. Customer facing staff have often told me that senior managers seem unaware of 'what the job's really like' and in the worst cases that 'issues and problems are not reported up-line'. Although the majority of call/contact centres have a reasonably flat hierarchical structure, it is apparent that some

communication, sometimes through team leaders is filtered and edited before it reaches 'the boss'.

Personal and corporate challenges

It is often the trainer that discovers how the staff really feel about organisational issues and initially works with their perceptions. These may emerge through the orientation procedures such as pre-course briefings or questionnaires, or in the training room once the course(s) has actually started. How these emotions and issues are dealt with is determined by a number of elements:

1. your contract with your sponsor(s)
2. your position within the centre
3. your skill set and experience
4. your professional ethics.

1. Your contract with your sponsor(s)

A consultancy brief that includes identifying and working with issues of change may allow sufficient scope to help find pragmatic solutions to organisational issues such as these.

On major call/contact training programmes it is common to scope the requirement and make proposals prior to commencing any training design work. Larger programmes are likely to incorporate a range of complimentary skills and know-how provided by different suppliers.

The larger the project, the more likely there will be multiple decision makers within the client organisation who will want to input into the programme. They will all have their own priorities, concerns and agendas. Typically these emerge within a project team context as the detailed requirements of the organisation and call/contact centre are talked through. However, they may not be explicitly stated. If the client culture is untrusting, there is some serious groundwork required if project team members are to relate to each other in an authentic way. Seasoned suppliers or internal employees anxious to protect their reputations may be reluctant to discuss 'bad news' in a group context unless an appropriate context has been set. Here the skills of the project manager or change agent are essential in drawing out all parties' views, recording issues and decisions and highlighting critical areas of attention. The application of these skills becomes increasingly important as milestones or deadlines for deliverables approach. A facilitatory style of communication is often needed to draw out such potential problems and find suitable solutions. These may be aired in group meetings or individual sessions. However, failure to provide or obtain this information inevitably results in the project plan going off course, with additional costs and serious implications for the achievement of the centres commercial objectives.

The financial contract

A contract does not have to be in writing to be legally binding, many projects may commence on the basis of a verbal agreement and are then formalised afterwards with a letter of intention.

As an external trainer/change agent providing a discrete item or responsible for the successful implementation of a whole programme it is important that your written contract with the client organisation accurately states the agreed deliverables, the amount you'll be paid and the terms and conditions. As even the simplest project may be subject to change it is worth documenting a change control procedure that allows reworking and movement for both supplier and client.

As an internal consultant, due to informality, it is easy to overlook the contract. Whilst you might not require billing details, payment terms and conditions, it is necessary to document what you will do, when it will be done, and other key factors, such as resources or facilities required as well as potential pitfalls. You may decide to call it by another name, such as 'a training and consultancy brief', however, it's production and distribution will help to ensure that all parties are in alignment on key aspects. This is essential if you are to work together to achieve the desired outcomes.

The psychological contract

Many trainers/change agents are positioned as 'experts' in the eyes of their clients because of their valuable skills and judgement. Unfortunately a downside of this can be that consciously or otherwise both parties conform to expected corresponding behaviour. Whilst the trainer may have significant skills to contribute, having to act continuously as the font of all knowledge is counterproductive to identifying issues, building relationships and providing best training and consultancy solutions. When challenged, it can also encourage defensive or arrogant behaviour that serves to isolate further. Of course, there may well be times when the trainer/change agent has to take a stand for what they know works and to argue passionately for principles and practices to be implemented. This must be done in the context of a collaborative relationship built on trust and mutual respect. Unless expectations are actively managed it can be easy to find oneself acting out a part projected by others without realising it.

Alternatively the trainer may find it difficult to position him/herself as capable of providing additional input if they are only perceived as supplying one element of the programme.

We all have our own unconscious biases, beliefs and sometimes preferred, metaphors for informing us when we view organisational issues in the call/contact centre. Many of these may be formed by our personal history or life experience, some by our professional expertise. By their nature these can only offer a partial view of the organisational

situation. Therefore, being aware of how we think and make decisions is a fundamental building block of professional practice. Our own self-knowledge will help inform us of where and how we can strengthen the service we provide.

As an external, when working on client site for long periods of time or working in an internal training position 'going native' or falling into 'group-think' is an occupational hazard. These terms are defined as becoming so identified with your clients' position that you cease to be able to function objectively and unconsciously colluding with the client's/ boss's/company's perception of issues without examining the rationale underpinning it. To counter these I recommend that as trainer/change agent you have set up support networks, in external mentors or colleagues to provide you with objective 'shadow' consultancy'.

2. Your position within the centre

the internal trainer/change agent

As an internal trainer/change agent you are more likely to know who to approach and how best to communicate with them. A disadvantage may be that you are perceived as being part of the problem or may not have the credibility required to influence managers in other departments. If these conditions apply and assuming you want to act you have a number of options:

- To identify the issues and bring them to the attention of your boss. Politically a sound move, you may want to copy others in on your findings.
- To identify the issues and raise your own profile, (and personal power) through communicating directly about them to the people involved - a potentially high risk/ high reward strategy.
- To identify the issues and seek help to communicate them for and with you. Well chosen allies who can provide you with information, support and advice can be very useful. These may be from your peer group, if you have one, or other managers. Thought should be given to whom you choose and how they are perceived by the people you seek to influence.
- Respect the people and the boundaries of the system you're working with. Attitudes, behaviour and structures are in place because they once helped that entity to survive. Assisting in their deconstruction should be undertaken with respect and an honouring of the purpose they serve.

The external trainer/change agent

As an external, people may be more prepared to listen to you, but inclined to resent your presence or see you as the knight in shining armour come to save them. Neither stance is helpful. Upon identifying factors additional to, but affecting your brief you can:

- As a matter of courtesy and to fulfil your contractual obligations inform your client/project sponsor as soon as possible. Provide a written summary of each issue and its implications. You may want to indicate options for solutions. However, until you have tested out your perceptions with research it is unwise to be too specific.
- Identify who you think the main players are in each scenario and the possible consequences of addressing the issues from your client's perspective. Consider how can the company and decision makers may benefit from addressing the issues. Explore the probable results of not doing anything.
- Use colleagues and mentors to rework ideas and strategies. This way you can perform 'reality checks', receiving advice and feedback on your own thinking and performance in a safe environment.
- Explore issues from perspectives of all involved. Examine possible causes, beliefs, enablers, motivating factors and strategies
- Know when to stop and cut your losses. Some investment of personal time and energy is inevitable in raising awareness of organisational change issues, particularly in a sales situation. If however, after advising your clients at the most senior levels you find yourself committing a disproportionate amount of resource to the project be prepared to withdraw gracefully.
- As with the internal trainer scenario, respect the people and the boundaries of the system you are working with. Attitudes, behaviour and structures are in place because they once helped that entity to survive. Assisting in their deconstruction should be undertaken with respect and an honouring of the purpose they serve.

You may find a common belief is that only the CEO of an organisation can afford to be interested in taking a broad view of issues affecting the organisation and the call/contact centre. Also, some may think that the CEO's stance will be disproportionately shaped by financial concerns. This leads many managers to press on with implementing a programme, even when they suspect conditions need more preparation. It's important for the trainer to recognise the pressures the CEO or directors may be under in satisfying the City or shareholders return on investment. Doing some preliminary work, even if it is at an early stage, in identifying the financial drivers of the company/contact centre and how change might be monitored to achieve a quantifiable return on investment can help key decision makers see the value of any proposals for change.

3. Your skill set and experience

It is not necessary, nor likely that the trainer/change agent will know how to resolve all of the organisational issues affecting the proposed training programme. The depth and breadth of knowledge required is probably too large for one individual or even a small team unless they have specifically commissioned to undertake a change management project. Also they are unlikely to be in possession of confidential company financial and policy information required to understand key structures and decisions. It is necessary that the trainer can identify what the issues are and flag them for attention. In broad terms they will require the following abilities and personal qualities:

- An intellectual ability to learn, collect and evaluate information, reason and think creatively.
- Empathy and ability to work with people, generating trust and cooperation.
- Communication skills to motivate and persuade, including the ability to train and coach.
- Courage, resilience, self-confidence, optimism, self-control and flexibility to work with multiple perspectives, changing situations, paradox and contradictions.
- To have the humility to admit mistakes, and be informed by ones experience.

4. Your professional ethic

Depending upon your chosen area of specialisation there are many professional associations and bodies who all have their own professional code of ethics members agree to adhere to. As a client it is worthwhile to enquire which memberships are held and their conditions.

The majority of trainers and change agents take pride in delivering high standards of service to their clients. This should include taking reasonable professional care as they go about their business, acting with integrity and maintaining client confidentiality.

In this article we have explored how an initial training brief can expand to potentially include aspects of human resource management and change management. Both of these areas are distinct specialisations in their own right. It's important therefore to be honest about your own level of competence in areas other than your specialisation and know when to bring in more experienced colleagues as the client brief expands.

Working relationships should be characterised by openness, tolerance and mutual consideration with the end objective being to have had the centre and its people benefit from participating with you.

Assessing whether the organisation and call/contact centre is ready to implement a training programme requires sound judgement.

The eight-step checklist below may help to provide some indicators:

1. Have the business requirements and training needs been clearly identified?
- 2 Have the surrounding issues or problems been identified?
- 3 Is senior management aware of the issues surrounding training implementation and the benefits attached to their resolution?
4. Given market and company conditions, are the desired changes feasible?

5. Is there alignment and commitment at senior management level to address these issues?
- 6 Have the desired changes been specified and timetable been drawn up?
- 7 How will management support implementation?
- 8 What, if any, additional resources do you require to complete your brief to quality and to deadline?

Conclusion

As call/contact centres continue to evolve they need training practitioners to provide real assistance with business and industry issues, using advanced change agent, training design and delivery skills.

Trainers and consultants that are prepared to engage with their clients and help them to confront and resolve their issues will be those that thrive and prosper. Now is the time for trainers within the call/contact centre industry and those aspiring to join them to rise to new levels of accountability and professionalism.

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