



Improving
Customer Experiences for
Leading Businesses
Worldwide

Work-at-Home Training

June 10, 2020

Mandy Harshman
Partner & Managing Consultant
McIntosh & Associates

mharshman@mcintoshassociates.com
972 365 7331
mcintoshassociates.com



McIntosh & Associates Management Consulting

MCINTOSH
& ASSOCIATES



Founded in 1997, McIntosh & Associates specializes in call/contact center strategy, technology, and operations



McIntosh's partners bring an average of 29+ years of call center operations and consulting experience to each engagement



McIntosh consulting teams customize proven frameworks, methodologies, and consulting tools for each client



Recommendations are data driven and always include an analysis of business, customer, and employee impacts



We support domestic and global clients from our Dallas, Texas headquarters with full-time consultants in Atlanta, Chicago, Cincinnati, Houston, Memphis, & Phoenix

McIntosh Clients



Current Situation

The COVID-19 pandemic forced contact centers to quickly deploy work-at-home (WAH) operations

resulting in

A focus on operational readiness vs. operational excellence

Post COVID-19, firms must better understand and manage the technology, processes and staffing requirements for remote/virtual operations; requirements will include:

Innovation

Flexibility

Rethinking
Traditional
Approaches

In recent weeks, McIntosh & Associates has written white papers on WAH processes for scheduling, performance management and today's topic, training.

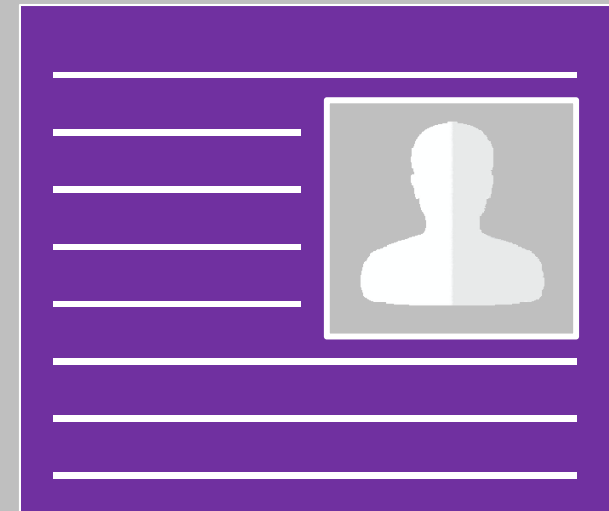
Prior to Virtual Training Delivery

Introductions & Trainee Profile

- Set up virtual space for new-hires to complete a profile prior to first day of training
- Establish profile template to avoid awkward sharing of too much information
- Set deadline to complete; instructor follow-up with those who do not complete by date

Profile Information may include:

- Photo
- Location (city/state)
- Full name
- Nickname preference (if applicable)
- Favorite movies/books
- Hobbies/travel interests
- Number of kids or names/types of pets
- Last job
- Why they are eager to work for the company
- What they plan to be doing in 20 years



Prior to Virtual Training Delivery, continued

Expectations

- Overview of classroom agenda
- Name of instructor and profile
- Any SME participants' names and profiles

Technology

- Provide equipment or list of technical requirements
- Provide virtual link to verify/test configuration w/VAH Help Desk

Pre-work

- Send any pre-work along with due date (e.g., compliance/security or confidentiality docs)
- Use DocuSign if document signatures are required

New Hire Supervisor

- Identified and dedicated to new-hire training class through nesting
- Places introductory call to all trainees prior to class (reduces "no show" rate)

Instructor Expertise

- Practice using equipment and software in advance
- Proficient in posing questions, using white board and chat functionality, recognizing questions, etc.

Virtual Classroom Approach & Guidance

TIMING



- Follow agenda and timeline; deliver on expectations that were set, resist rushing through if participants are silent – toss out questions to gauge engagement
- Stretch once an hour, having team members lead stretches as they become comfortable

VISUALS



- Slides should provide an overview of the instructional material with instructor speaker notes covering details
- If participants cannot read all the words on a slide from their PC monitor, it is too detailed

VARIETY

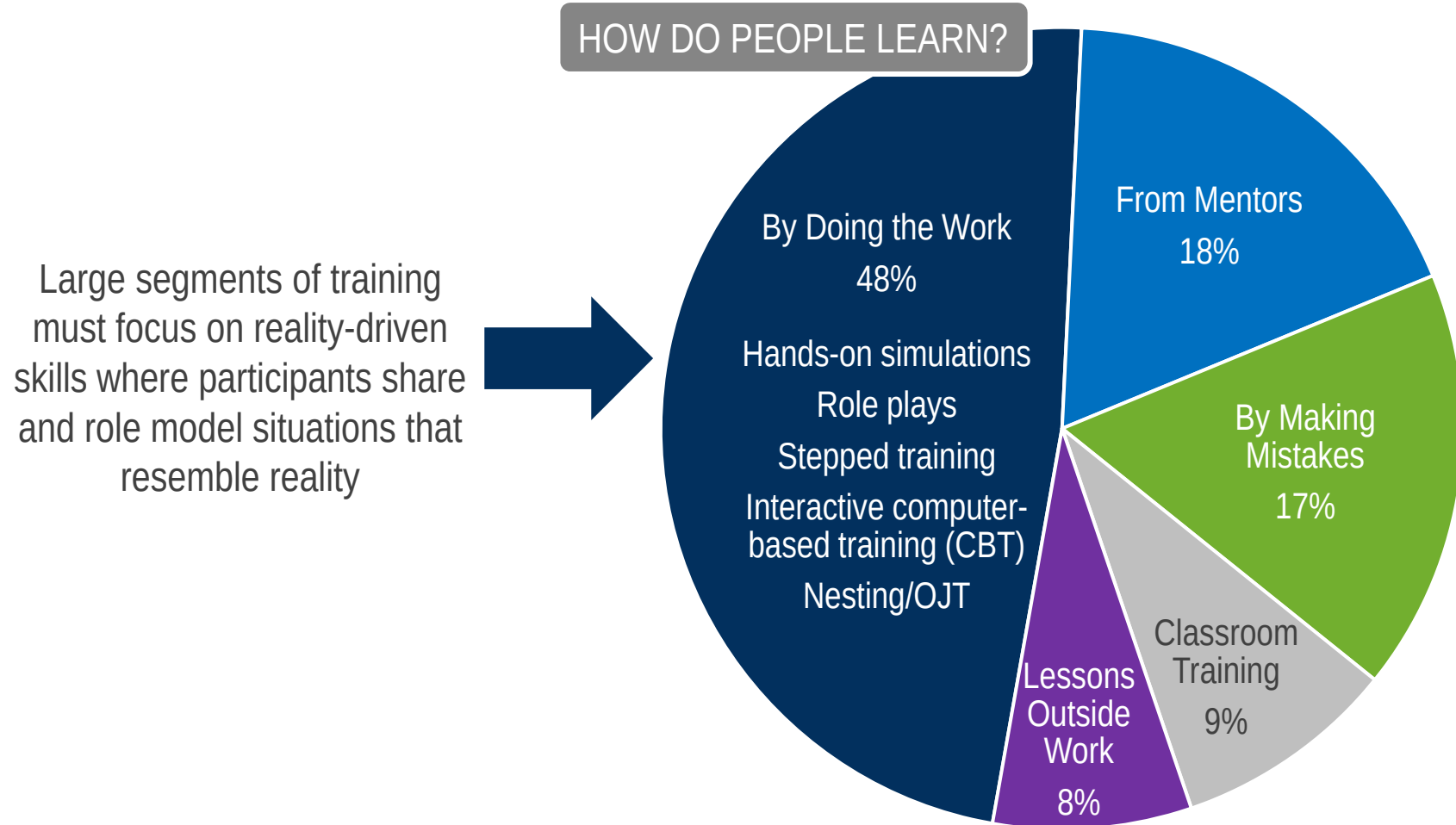


- Use videos, full call examples, call snippets or classroom exercises for a change of pace
- Attempt to provide materials for auditory, visual and tactile learners
- Interject insights such as a personal story or example when you feel attention waning

LINKAGE



- Link KPIs and training, using the “WIIFM” to demonstrate the personal value in what is being taught
- Reinforce linkage to customers by using CX slides and survey verbatims



Source: Center for Creative Leadership

Curricula Breakdown

Time Allocation	Activity
5%	Self-directed study modules for industry focus and functional literacy <i>Collections, tech support, customer service, sales/retention, reservations, order entry</i>
20%	Lecture-based for product and service information <i>Soft skills and de-escalation training may be included here but <u>must be</u> practiced in side-by-sides or role play activities</i>
10%	Computer-based-training or simulated systems drills to cover and practice systems functionality
35%	Experience based activities/exercises, providing hands-on experience <i>(See following slide for examples)</i>
5%	Product/service videos on authorized websites or shared through the virtual classroom
5%	Testing of proficiency of materials trained <i>Gamification is a useful tool for (seemingly) impromptu tests or drills</i>
~20%	Nature breaks and lunch <i>(Based on an 8.5 hour day)</i>

Exposing the New Hire to Reality

Build a Call Library

- Carefully screened, recorded snippets (not whole calls)
- Selected to reinforce training objectives and embedded in curricula

Call Monitoring

- During initial days of training, play customer calls that are recorded and selected in advance; discuss with the class after the calls
- Provides context and establishes professional norms for call handling

Virtual Side-by-Sides and Mentoring for Performance Improvement

- Identify, train and certify high performing agents as SMEs
- Assign SME to each new hire; new hire will observe SME take calls in a one-on-one setting (including screens if at all possible)
- After observations, SMEs uses ACW to discuss/provide mentoring

Agent-to-Agent Role Plays

- One trainee uses prepared script to play caller, second student handles caller's request without a script
- Conducted using modified Wizard of Oz approach

Success Factors

- Recognition and preparation for the fact that WAH training is more complex and challenging than in traditional brick and mortar environments
- Partnership between training and operational departments to develop and deliver proven content in new and innovative ways
- Testing and deployment of virtual training and communication tools, however robust or limited
- Careful selection and certification of supplemental resources to support the new hire experience during and after training delivery including SMEs, the new-hire supervisor and the nesting instructor

McIntosh & Associates WAH White Papers are available on our LinkedIn page for:

- Training
- Scheduling
- Performance Management

Thank you!