Building Fluent Performance in a Customer Call Center

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AT&T Wireless Services

Overview

- Introductions
- Fluency Development: Background and Principles
- Case Study: Development, Implementation, Results
- Some Video Clips
- Q & A
Background

- Fluency research since the late 60's
- Primarily Educational applications through 70's
- Business applications beginning in mid-80's (Binder)
  - Huge impact on sales knowledge fluency
  - Led to Product Knowledge Systems, Inc.
- New application in Customer Call Centers
  - New performance requirements
  - New implementation environment
  - Front line design, development, delivery
  - Rapid Application Development/Prototyping

The Context for Fluent Performance

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<th>Behavior</th>
<th>Job Outputs</th>
<th>Business Results</th>
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<td>Asking</td>
<td>Problems</td>
<td>Profits</td>
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<td>solved</td>
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<td>ROI</td>
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<td>Goal-setting</td>
<td>etc.</td>
<td>Signed</td>
<td>Customer</td>
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<tr>
<td>Job Design</td>
<td>etc.</td>
<td>contracts</td>
<td>satisfaction</td>
</tr>
<tr>
<td>Documents</td>
<td>etc.</td>
<td>Repaired</td>
<td>etc.</td>
</tr>
<tr>
<td>etc.</td>
<td>etc.</td>
<td>equipment</td>
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</tbody>
</table>

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The Six Boxes™
Controllable Behavior Influences

Expectations & Feedback (1)
Tools & Resources (2)
Consequences & Incentives (3)

Skills & Knowledge (4)
Selection & Assignment (5) (Capacity)
Motives & Preferences (6) (Attitude)

What is Fluency and Why is it Important?

- You will have exactly 1 minute.
- Write (abbreviate) as many words or phrases as you can think of responding to these questions.

Kindly don’t start……

….until I say….

“Please begin!”
Fluency: The Definition of Mastery

Fluency = Accuracy + Speed

= Quality + Pace

= Doing the Right Thing without Hesitation

= Automatic or “Second Nature” Response

= True Mastery

You can take behavior out of time...... but ....you can’t take the time out of behavior.

- Dr. Eric Haughton
Fluent Performance
Beyond Accuracy!

- Fluency (True Mastery: accuracy + speed)
- Practice and Ergonomics Make the Difference!
- 100% accuracy (traditional "mastery")
- Beginner's level (inaccurate and slow)
- Incompetence (no measurable performance)

100% Correct: A Measurement Ceiling

?? “Overlearning” ??

Percent correct is not a measure of performance.
**NO Ceiling on Time-based Measures!**

The only upper limits are physiological or environmental.

Count per minute is a true measure of performance.
Results Associated with Fluency

- **Retention and maintenance** of skills and knowledge

- **Endurance**, attention span, resistance to distraction (greater stability, less easily drawn off task)

- **Application** or transfer of training on the job and in subsequent learning (generativity, creativity)

**Valuable Learning Outcomes**
**Fluency Blockers and Fluency Builders**

- **Measurement** of performance and learning
- **Procedures** for learning and practice
- **Materials** for learning and reference
- **Skill** elements (component movements)
- **Knowledge** elements (discriminations, verbal relations, etc.)

**Features of Learning and Performance Systems that Can Either Prevent or Ensure Fluency.**

**Stages of Learning**

- **Stage One** Acquiring new behavior
- **Stage Two** Practicing components for fluency & endurance
- **Stage Three** Applying and combining fluent components

Each requires different procedures and materials.
Michael Jordan on Practice

“If you want to get better at anything, you have to practice. There’s no other way to do it. For me practicing is fun. I enjoy improving myself, and I enjoy developing new skills.”

Michael Jordan, 1991
Television Spot

Effective Practice Requires Different Procedures and “Materials”

“I practiced as much as anyone…. For years I hit 500 balls a day. There is no such thing as natural talent, there is natural ability, but talent comes only after relentless practice and fine-tuning.”

Sam Snead
3-time PGA Champion
Behavior Components and Composites

- Links and Chains
- Discriminations and skilled movements
- Coordinated movements of multiple components
- Elements of associations or stimulus equivalence
- Terminology
  - Part / Whole
  - Tool Skill / Basic Skill
  - Element / Compound
  - Component / Composite

“Core Fundamentals”

Ray Charles on Practicing Elements

**ROBERT SIEGEL:** You practice a lot?

**RAY CHARLES:** Whenever I can. I don’t -- I don’t practice as much as I would like to, because I’m not around a big piano all the time. But I try to, you know, I try to practice a little bit every day for the most part.

**ROBERT SIEGEL:** And when you practice, I mean, do you practice the tunes that you’ll be playing at the next concerts......?

**RAY CHARLES:** Oh, no, no, no, no, no, no, no, no, no, no.....

**ROBERT SIEGEL:** I guess the answer is no, you’re saying?

**RAY CHARLES:** No. No. I practice things like scales and chords and movement of my hands and things like that, because, I mean, I -- what I’m going to play on stage, I know. What I’m practicing for is to try to improve what I might play, you know. You gotta practice. I mean you gotta keep your fingers loose, you gotta keep your mind active, you know, because what your mind think of -- the question is: what your mind think of, can your fingers play it?

**ROBERT SIEGEL:** Right.

*Interview on National Public Radio
Celebrating Ray Charles 50 years in recording
September 23, 1997*
Using Learning Channels to Specify Behavior

<table>
<thead>
<tr>
<th>Inputs</th>
<th>Typical Outputs</th>
<th>Learning Channel Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>See</td>
<td>Say</td>
<td>See/Say to read words from a job aid</td>
</tr>
<tr>
<td>Hear</td>
<td>Write</td>
<td>See/Mark to select choices on a discrimination worksheet</td>
</tr>
<tr>
<td>Sniff</td>
<td>Mark</td>
<td>See/Say to answer questions presented on practice cards</td>
</tr>
<tr>
<td>Touch</td>
<td>Click</td>
<td>Hear/Click•Say to report requested info from the intranet</td>
</tr>
<tr>
<td>Taste</td>
<td>Abbreviate</td>
<td>Free/Abbreviate to brainstorm ideas for later discussion</td>
</tr>
<tr>
<td>Free</td>
<td>Do</td>
<td></td>
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</tbody>
</table>

Notes:
* Free as an input is when there is no external stimulus for each response (e.g., in brainstorming)
* When there are combined inputs or outputs, the convention is to use a dot, as in Hear/Click•Say

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Learning Channel Matrix

<table>
<thead>
<tr>
<th>Sniff (Sn)</th>
<th>Touch (To)</th>
<th>Taste (Ta)</th>
<th>See (S)</th>
<th>Hear (H)</th>
<th>Free (Fr)</th>
<th>IN</th>
<th>OUT</th>
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</thead>
<tbody>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Say</th>
<th>Write</th>
<th>Mark</th>
<th>Abbreviate</th>
<th>Type</th>
<th>Click</th>
<th>Point Tap</th>
<th>Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
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</tbody>
</table>
Some Customer Service Practice Activities

<table>
<thead>
<tr>
<th>Learning Channel</th>
<th>Performance Statement</th>
<th>Fluency Standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>See/Say</td>
<td>Respond to practice cards with key facts, terms, and associations</td>
<td>60-80 per minute, with 1 or zero errors</td>
</tr>
<tr>
<td>Hear/Say</td>
<td>Respond to questions or prompts from facilitator or partner on same content as covered by practice cards</td>
<td>15-25 per minute correct</td>
</tr>
<tr>
<td>See/Mark</td>
<td>Mark codes on worksheet for billing, complaints, service type, and other purposes to indicate type of code (discrimination of types)</td>
<td>35-45 per minute with no errors</td>
</tr>
<tr>
<td>See/Say</td>
<td>Say code for type of complaint, billing problem, service type, etc. listed on front of practice card</td>
<td>60-80 per minute</td>
</tr>
<tr>
<td>Hear/Say or See/Say</td>
<td>Respond to questions or objections read from cards or stated by partner, covering key points accurately, succinctly and clearly</td>
<td>Normal, confident speaking pace</td>
</tr>
<tr>
<td>See/Click+Write</td>
<td>Navigate Customer Care intranet to find and record specific product and procedure information requested on worksheet</td>
<td>5-10 per minute correct (or as fast as system will allow)</td>
</tr>
<tr>
<td>Hear/Click+Say</td>
<td>Navigate Customer Care intranet to find specific product and procedure information requested by partner</td>
<td>10-20 per minute correct (or as fast as system will allow)</td>
</tr>
<tr>
<td>See/Mark</td>
<td>Find opportunities for improved language in transcript of interaction with customers, focusing on quality criteria used to evaluate service quality</td>
<td>8-12 per minute</td>
</tr>
<tr>
<td>Hear/Say</td>
<td>Rephrase fuzzy statements of customer problems or customer inquiries read by partner from cards</td>
<td>Normal, confident speaking pace; correctness judged by partner</td>
</tr>
</tbody>
</table>

Setting Fluency Standards/Criteria

- Repeated timings with one or more “experts”
- Let highly motivated performers “top out”
- Set aims and see if they work. Raise as needed.
- Use generic aims for different learning channels.
- In some cases, “timing” may be comparative pace - e.g., “speaking at normal confident pace about.........”
Case Background: ATTWS Customer Base Marketing

- Needed to train and ramp up many new hires rapidly.
- Current training was 2 weeks and going to 3 weeks due to exploding information; much “re-training”.
- “Blended” inbound-outbound calling environment.
- Attended FluencyBuilding™ Workshop
- Management (Lee) decided to apply FluencyBuilding methods to achieve rapid productivity ramp-up.
- Supervisors and Leads, not external trainers, redesigned and delivered training.

Key Questions for Analyzing Performance

- What do performers DO?
- What must they KNOW fluently?
- What must they be able to LOOK UP fluently?
The Bull’s-eye Model of Course Content

Nice to Know
Need-to-Know
Core Fundamentals must be Fluent
Fluent Look-up
Learn Later on the Job

Components of the Intervention

Expectations & Feedback (Box 1)
- All levels of management expect fluent performance
- Many timed measures and public feedback per day
- “Trainers” were Manager, Supervisors, Lead Reps

Tools and Resources (Box 2)
- Redesigned paper job aids (e.g., larger type)
- Different learning materials
- Supervisors and Leads as Fluency Coaches
Components of the Intervention, cont’d

Consequences and Incentives (Box 3)
- Frequent informal praise and recognition, “cheerleading”
- Competitive games and activities (winning)
- Focus on “personal best”

Skills and Knowledge (Box 4)
- Knowledge components for verbal interaction
- Screen codes and navigation
- Online look-ups and using the job aids
- Data entry

Practice – Effectively!

- Reasons traditional “drill & practice” fails:
  - lacks explicit fluency criteria as goals
  - long durations stretch endurance and attention
  - often the “chunks” are too big

- Reasons well engineered practice succeeds:
  - includes explicit time-based goals for practice
  - brief durations allow peak performance
  - builds fluent elements before application

Example: Fluent look-ups.
**A Shift in Program Time Allocation**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Previous Model</th>
<th>New Fluency Model</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom Lecture</td>
<td>70%</td>
<td>25%</td>
</tr>
<tr>
<td>Observe Tenured Performers</td>
<td>10%</td>
<td>0%</td>
</tr>
<tr>
<td>Review and application of job aids</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td>Fluency Practice Exercises</td>
<td>0%</td>
<td>55%</td>
</tr>
<tr>
<td>On-the-Job Training</td>
<td>10%</td>
<td>5%</td>
</tr>
</tbody>
</table>

**A Typical Hour in the “Learning Gym”**

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>15 mins</td>
<td>Lecture - discussion.</td>
</tr>
<tr>
<td>3 mins</td>
<td>2-minute quiz (See/Mark) on content from lecture.</td>
</tr>
<tr>
<td>3 mins</td>
<td>Coach prompts choral responding (Hear/See/Say) of correct answers, corrects or explains errors, and writes answers on board.</td>
</tr>
<tr>
<td>4 mins</td>
<td>Coach prompts and writes count per minute scores on board, while trainees record own performance on recording sheet.</td>
</tr>
<tr>
<td>3 mins</td>
<td>Coach erases answers from board and asks class for choral responding to quiz questions in random order (Hear/Say).</td>
</tr>
<tr>
<td>10 mins</td>
<td>Lecture/discussion continues.</td>
</tr>
<tr>
<td>5 mins</td>
<td>Coach instructs trainees to rapidly recall and write down (Free/Abbreviate) as much as they can recall in two minutes.</td>
</tr>
<tr>
<td>3 mins</td>
<td>Coach prompts trainees to say what they wrote; writes their responses on the board. Coach clarifies answers, as needed.</td>
</tr>
<tr>
<td>5 mins</td>
<td>Lecture/discussion resumes.</td>
</tr>
<tr>
<td>5 mins</td>
<td>Coach asks trainees to do a 1-minute timing on practice cards (See/Say) covering content included in lecture. They record scores and say them aloud so Coach can record them on board.</td>
</tr>
<tr>
<td>4 mins</td>
<td>2-minute See/Mark quiz on content from this hour, with correction.</td>
</tr>
</tbody>
</table>
Fluency Coaching Best Practices

- Planning and Preparing
- Setting Expectations
- Managing Time
- Measuring and Recording Performance
- Correcting Errors – Creating Learning Opportunities
- Providing Motivation and Focus
- Making On-the-Spot Decisions and Changes
- Solving Individual Learning Problems – Using the Data!
- Supporting Group Learning – Teamwork and Cooperation
- Encouraging Individual Self-management of Learning
- Maintaining Energy and Fun
- Working with Coaching Partners

A Coaching Feedback Tool

Fluency Coaching™ Worksheet

Fluency Coach: ______________________  Class: ____________________Observer: ____________________   Date: __________

Coaching Success Factors | Observations | Suggestions
---|---|---
Planning and Preparing
- Pre-plans possible back-up exercises
- Reviews/keeps group performance levels on key practice exercises from day-to-day
- Plans suggestions for helping individuals whose timings have been flat
- Checks individual recording sheets daily

Setting Expectations
- Sets expectation for a high level of effort and excellence

Let's Take a Look
A Shift in Perspective

Typical Model

- Lecture Based
- Facilitator Dependent
- Train on Everything
- Passive Learning
- Final Test
- 100% Limit

Fluency-based Model

- Practice Based
- Student Dependent
- Focus on Need-to-Know
- Active Learning
- Continuous Measurement
- Fluency Standards with near-zero errors

Fluency Cards on Rates
ATTWS Retention New Hire Training
Group 1 Rep 8
- Correct Per Minute
- Record Floor
- Errors-Skips Per Minute
Correct Responses Accelerate (6 Trainees)

Correct responses per minute for each member of the group.

Qualitative Observations

- “Never a dull moment.”
- Energized, not numbed out by the end of the day
- “Bright eyed and bushy tailed.”
- “Boredom is our enemy.”
- Previously trained representatives asked if THEY could receive this type of training.
- Felt more like a gym than a classroom.
- Excitement, enthusiasm, confidence.

Positive Affect plus Accelerated Productivity
CSRs Surpass Productivity Benchmarks by 60% after Fluency-based New Hire Program

We asked the participants to capture their impressions on a video....
“Fluency bridges the gap between learning and performance.”

- Carl Binder

Thank You Very Much!