

Building Fluent Performance in a Customer Call Center



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Overview

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

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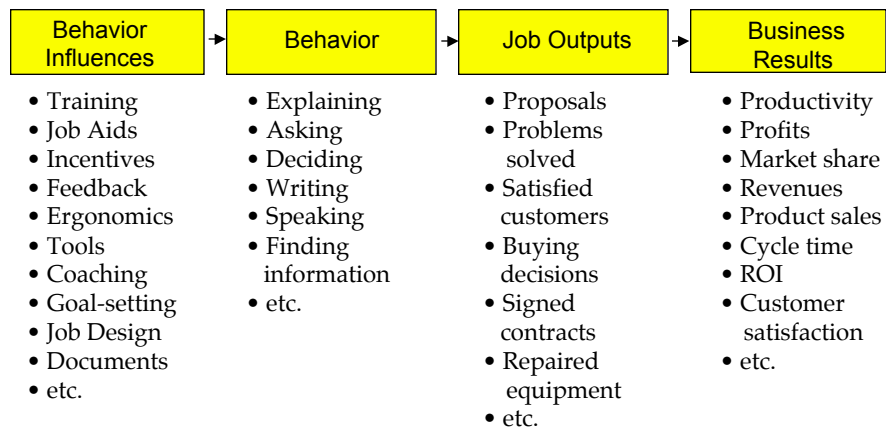
Background

- 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

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The Context for Fluent Performance



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The Six Boxes™
Controllable Behavior Influences

ENVIRONMENT EMPLOYEE	Expectations & Feedback (1)	Tools & Resources (2)	Consequences & Incentives (3)
	Skills & Knowledge (4)	Selection & Assignment (5) (Capacity)	Motives & Preferences (6) (Attitude)

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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!”

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Fluency: The Definition of Mastery

Fluency = Accuracy + Speed

= Quality + Pace

= Doing the Right Thing without Hesitation

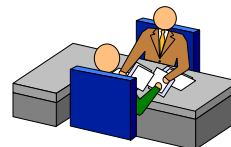
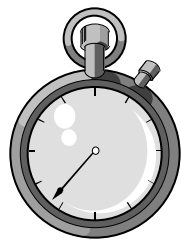
= Automatic or "Second Nature" Response

= True Mastery

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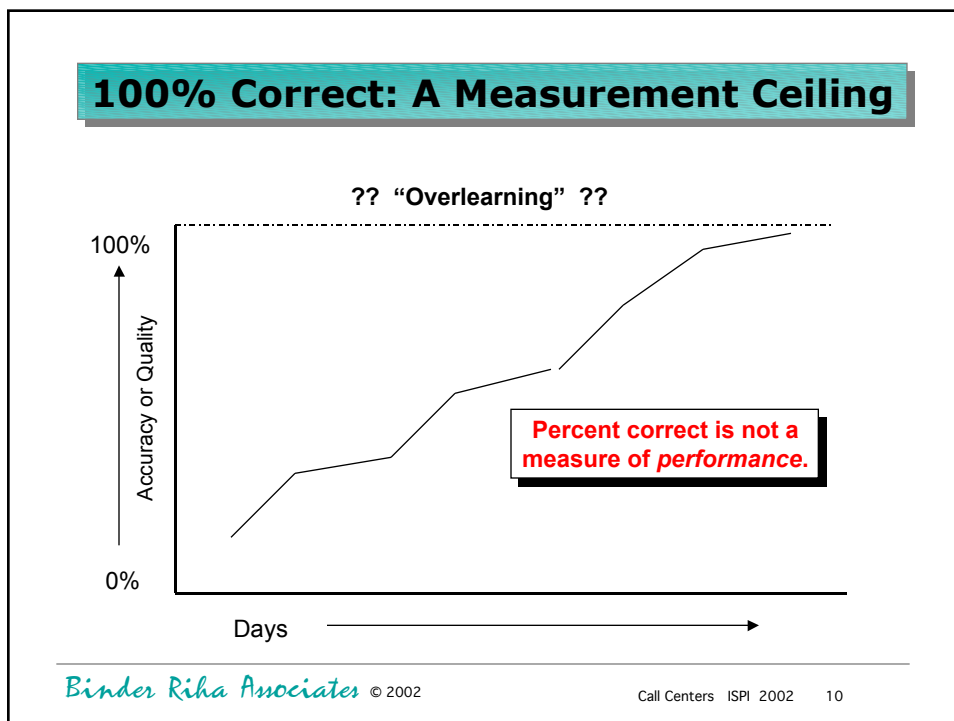
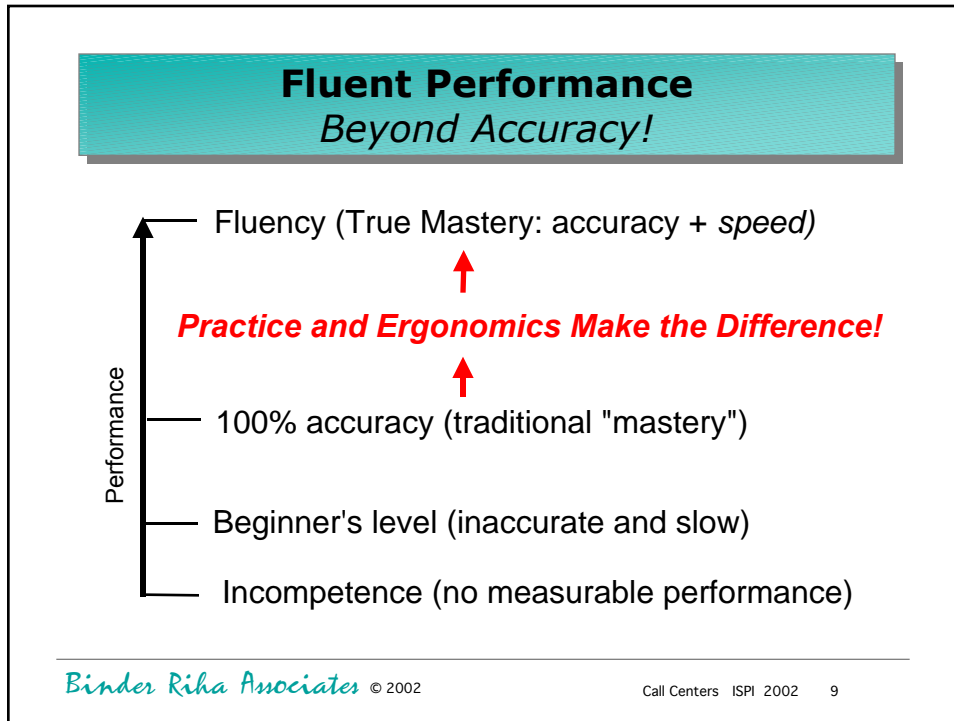
*You can take behavior out of time..... but
....you can't take the time out of behavior.*
- Dr. Eric Haughton



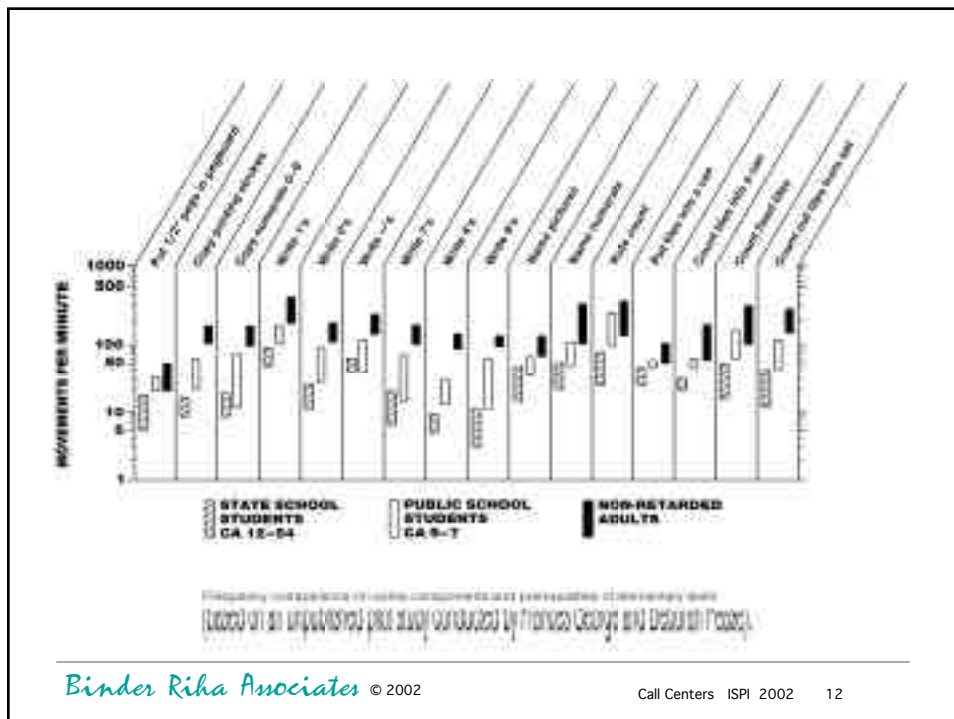
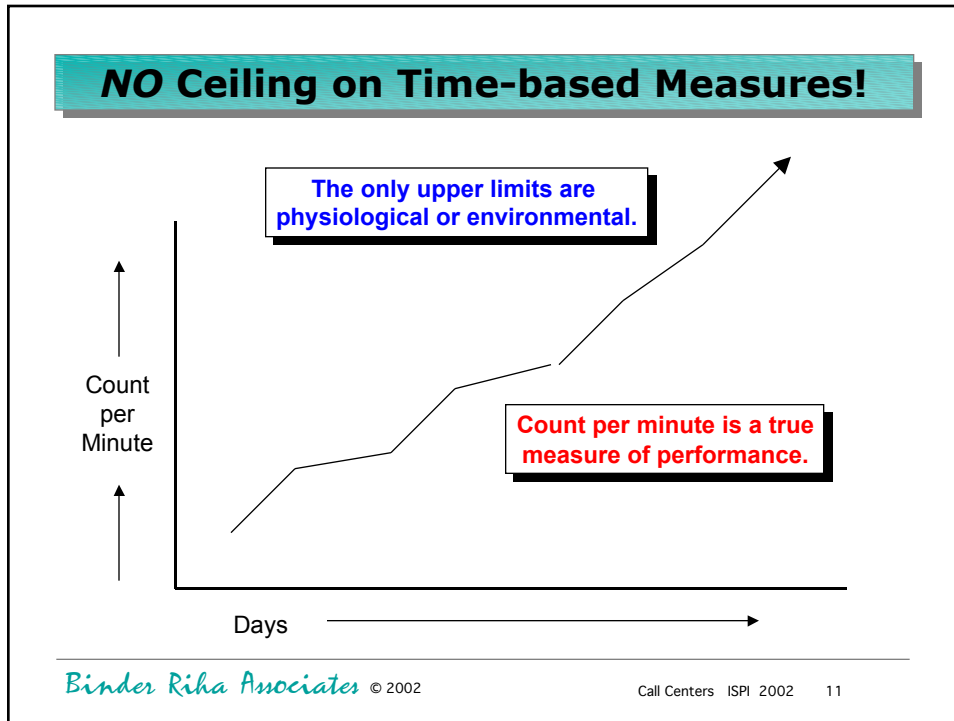
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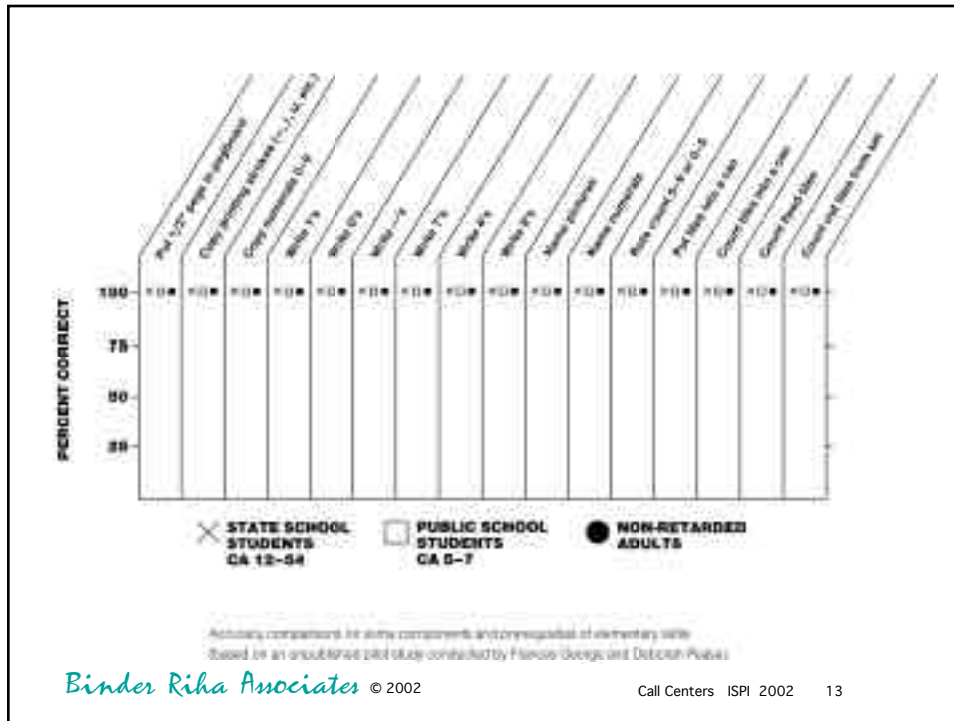
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Results Associated with Fluency

- **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

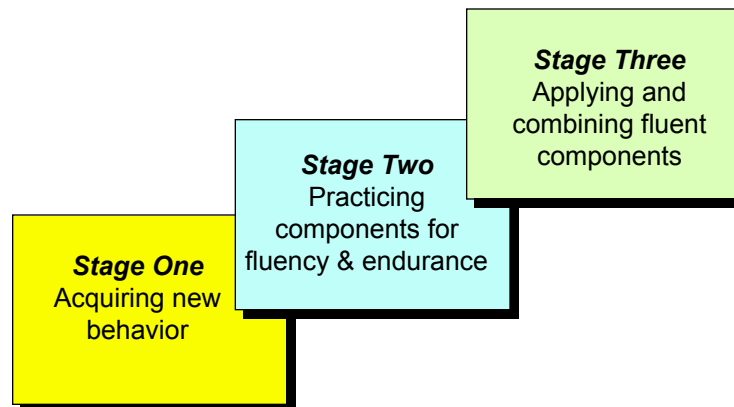
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Fluency Blockers and Fluency Builders

- **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



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*

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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”

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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, 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*

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Using Learning Channels to Specify Behavior

Inputs	Typical Outputs	Learning Channel Examples
See	Say	See/Say to read words from a job aid
Hear	Write	See/Mark to select choices on a discrimination worksheet
Sniff	Mark	See/Say to answer questions presented on practice cards
Touch	Click	Hear/Click•Say to report requested info from the intranet
Taste	Abbreviate	Free/Abbreviate to brainstorm ideas for later discussion
Free	Do	<p><u>Notes</u></p> <p>Free as an input is when there is no external stimulus for each response (e.g., in brainstorming)</p> <p>When there are combined inputs or outputs, the convention is to use a dot, as in Hear/Click•Say</p>

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Learning Channel Matrix

Skill or Knowledge Area: _____ Designer: _____ Date: _____

Sniff (Sn)								
Touch (To)								
Taste (Ta)								
See (S)	X	X	X			X	X	X
Hear (H)	X	X						X
Free (Fr)	X	X		X				
IN / OUT	Say	Write	Mark	Abb Abbreviate	Type	Click	Point Tap	Do

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Some Customer Service Practice Activities

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

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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.....”

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Case Background: ATTWS Customer Base Marketing

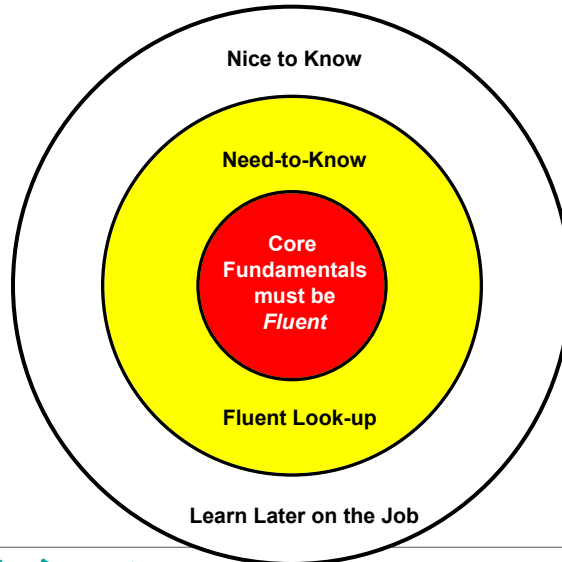
- Needed to train and ramp up many new hires rapidly.
- Current training was 2 weeks and going to 3 weeks due to exploding information; much “re-training”.
- “Blended” inbound-outbound calling environment.
- Attended FluencyBuilding™ Workshop
- Management (Lee) decided to apply FluencyBuilding methods 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*?

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The Bull's-eye Model of Course Content



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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

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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.

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A Shift in Program Time Allocation

	Previous Model	New Fluency Model
Classroom Lecture	70%	25%
Observe Tenured Performers	10%	0%
Review and application of job aids	10%	15%
Fluency Practice Exercises	0%	55%
On-the-Job Training	10%	5%

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A Typical Hour in the "Learning Gym"

Time	Activity
15 mins	Lecture - discussion.
3 mins	2-minute quiz (See/Mark) on content from lecture.
3 mins	Coach prompts choral responding (Hear•See/Say) of correct answers, corrects or explains errors, and writes answers on board.
4 mins	Coach prompts and writes count per minute scores on board, while trainees record own performance on recording sheet.
3 mins	Coach erases answers from board and asks class for choral responding to quiz questions in random order (Hear/Say).
10 mins	Lecture/discussion continues.
5 mins	Coach instructs trainees to rapidly recall and write down (Free/Abbreviate) as much as they can recall in two minutes.
3 mins	Coach prompts trainees to say what they wrote; writes their responses on the board. Coach clarifies answers, as needed.
5 mins	Lecture/discussion resumes.
5 mins	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.
4 mins	2-minute See/Mark quiz on content from this hour, with correction.

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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

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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/knows 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

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A Shift in Perspective

Typical Model

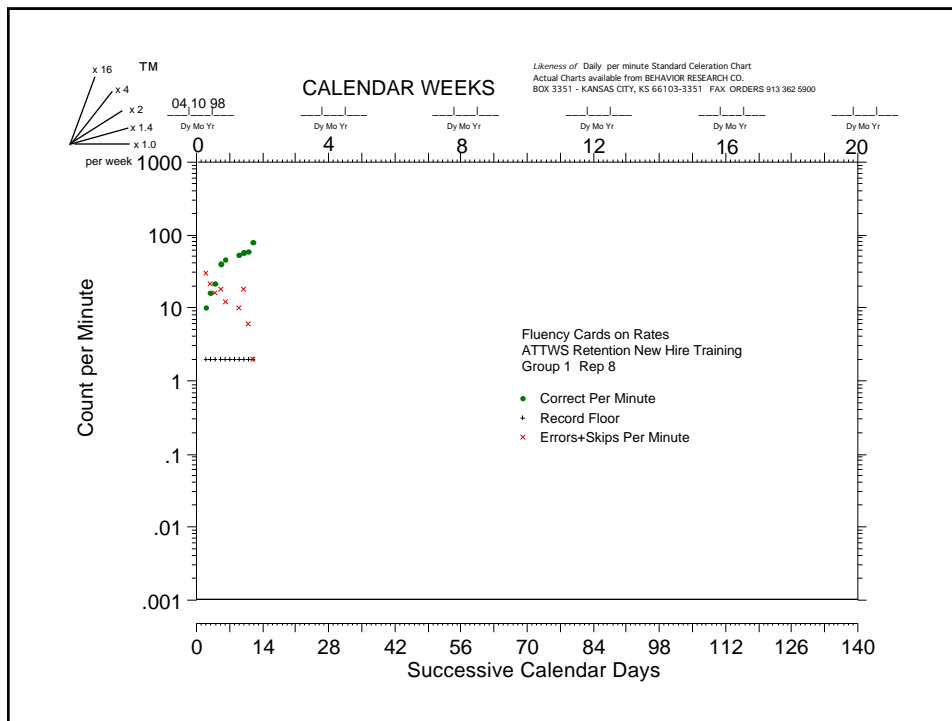
- Lecture Based
- Facilitator Dependent
- Train on Everything
- Passive Learning
- Final Test
- 100% Limit

Fluency-based Model

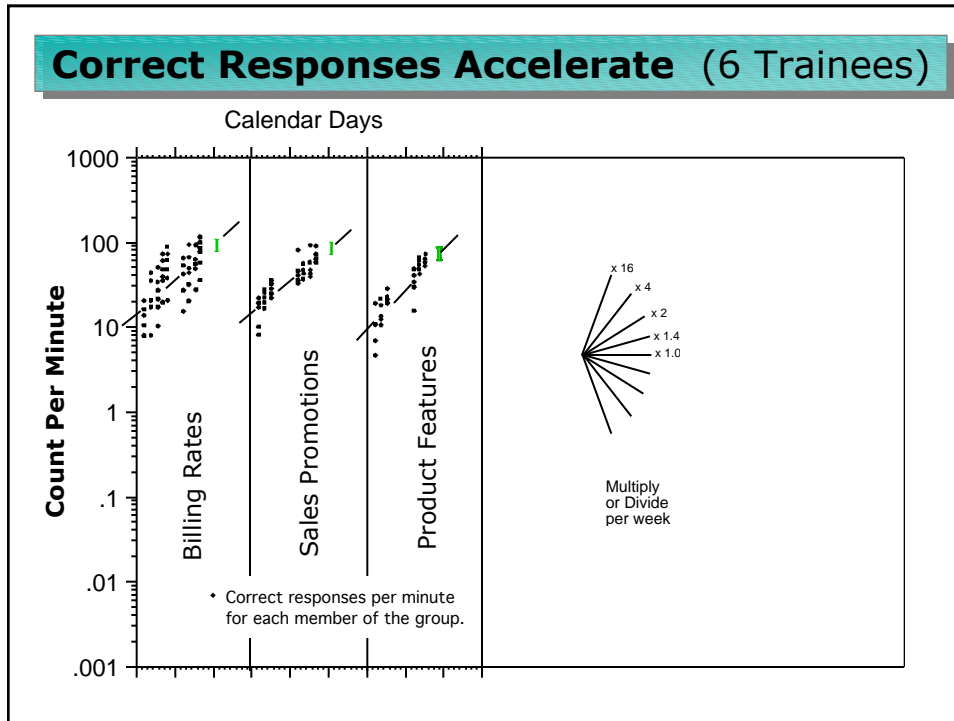
- Practice Based
- Student Dependent
- Focus on Need-to-Know
- Active Learning
- Continuous Measurement
- Fluency Standards with near-zero errors

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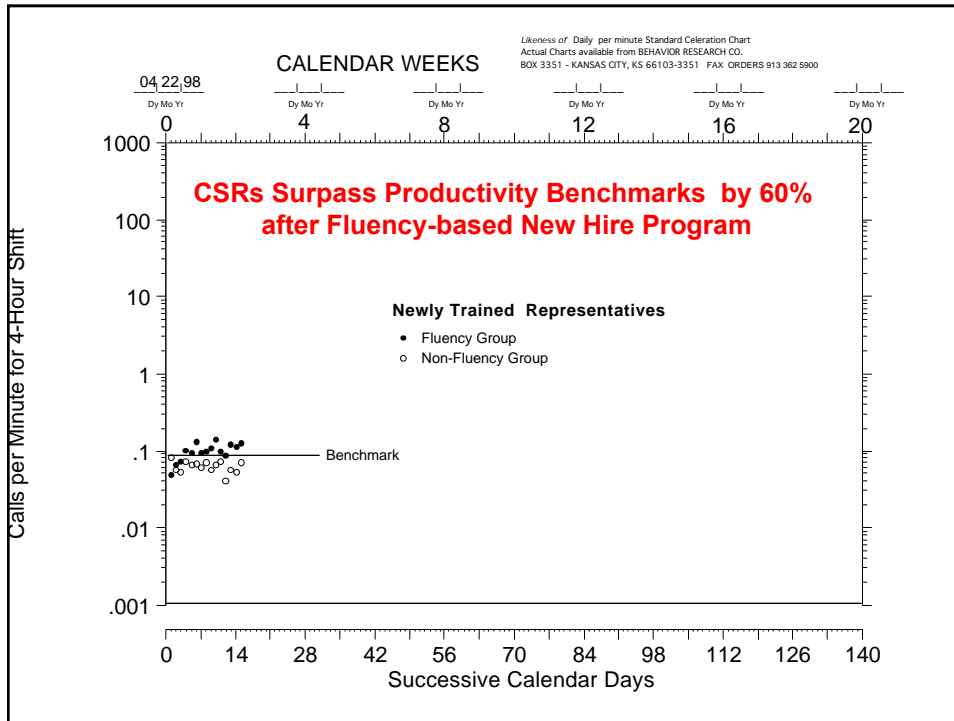


Qualitative Observations

- “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

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We asked the participants to capture their impressions on a video....

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“Fluency bridges the gap between
learning and performance.”



- *Carl Binder*

Thank You Very Much!