

# Learning at Internet Speed in the Contact Center

August 2000

Blair Pleasant



## Electronic Learning Converges on the Call Center

In today's fast-paced multimedia contact centers, customer service representatives (CSRs) are required to process more information in a shorter amount of time. With the implementation of complex CRM applications and new mediums of customer contact such as e-mail and Web chat, the complexity at the agent desktop is growing.

One of the hottest trends this century is e-learning, or Internet-enabled learning. e-learning reduces the costs associated with learning or training, while providing increased access to learning. While many people and businesses today are working at "Internet speed," e-learning provides a way to learn at Internet speed.

Contact center managers are turning to e-learning in response to the urgency of delivering and reinforcing training to improve CSRs' skills. Witness Systems, a recording and analysis software provider, is a pioneer in bringing e-learning to the contact center.

## A Look at the e-learning Marketplace

How hot is e-learning? One study found that 92 percent of large organizations are implementing some form of on-line learning this year, with companies like Cisco driving the concept of e-learning for their customers and employees. The market for e-learning and technology-based training is just taking off, and industry insiders claim that it will almost double each year for the next few years.

Many companies are finding that traditional training is becoming outmoded in our fast-paced economy. Knowledge is seen as a source of competitive advantage, and employees must have access to continual learning and training in the most convenient method possible – anytime and anywhere.

With Internet- or technology-based training and learning, companies can train more people, eliminate the downtime associated with training off-site and accelerate the learning process. Various studies have shown that e-learning cuts training time and improves retention by 25 to 50 percent, improves consistency of learning 50 to 60 percent, reduces costs by 40 to 60 percent, and reduces training time 38 to 70 percent. One organization, the National Information Infrastructure, found that e-learning and computer-based training enables 30 percent more learning in 40 percent less time at 30 percent less cost.

## E-learning - Coming to a Contact Center Near You

Quality customer service is only as good as the agents or CSRs providing the service. With the overwhelming importance that companies today are placing on customer care, customer loyalty, and customer relationship management (CRM), it has become more critical than ever for companies to have proficient and well-trained service representatives. This is compounded by the fact that the contact center has become even more complex – with agents handling not only telephone calls, but e-mail and Web interactions, such as Web callback, Web chat, and Web

collaboration. Gone are the days when agents could simply have a nice telephone voice and answer questions politely. In order to provide optimal customer services, companies have begun to offer customers a range of options for initiating contact with a company. More and more companies today recognize the importance of accommodating mixed media communications – voice, data, fax, and e-mail – in the customer contact center. At some e-businesses, for example, CSRs handle four interactive chat sessions at the same time, take phone calls, and answer e-mail.

Companies have to train staff accustomed to communicating with customers over the phone to use a new medium. For example, technologies like Web collaboration, or escorted browsing, requires a thorough understanding of how to use the Web browser to "push" pages to customers or use the technology to point the customer's browser to the appropriate web page, and how to navigate the company's web site. e-mail management and response systems also

---

**A direct closed loop performance environment, helps contact center managers know agents are getting the training they need.**

---

present new skills for the agent to learn in terms of using the technology as efficiently as possible. As the idea of Internet-enabled contact centers ramps and more transactions occur on the Web, companies will need to tap into the traditional pool of human resources and train those people to use the new technologies.

There is a difference in skills required for answering questions over the telephone and via e-mail or Web chat. While someone may be very pleasant on the telephone, they may not be a good typist, speller, or grammarian. It is very different to write/type an answer than it is to provide it over the telephone. Agents need to be able to send e-mail without grammatical errors or typographical errors. In many cases, this too requires training.

As if that weren't enough, many call centers use a variety of applications that the agents must be proficient at, such as CRM applications from companies like Siebel, Clarify (Nortel), and many others. Agents need to know how to use these tools, navigate through the various screens, enter data, and extract the necessary data.

As more and more interactions are taking place over the Web, simple questions and inquiries are being offloaded to e-mail and the Web, while more complex problems are being handled by call center agents. Agents are handling more sophisticated problems and questions, requiring continual training and education. Also, most companies try

to upsell or cross-sell products and services, and agents need to have a thorough knowledge of their company's product/service line. The more complex and sophisticated the companies' products and services, the more training is required. While agents may not need a great deal of training when Victoria Secret comes out with a new slip, hours of training may be needed when Cisco produces a new router, for example. Traditional call center skills also need to be reinforced periodically.

What this means is that traditional training not sufficient to meet the demands of today's complex Internet-enabled call center. So what's the solution – e-learning, of course!

### Highly-Skilled Reps: The Driving Force Behind Customer Loyalty

By offering ongoing education, corporations enjoy a higher rate of customer and CSR retention and a better skilled workforce – the foundation for achieving customer loyalty. E-learning in the contact center can help agents learn about the various contact center technologies they're using, as well as their company's products and services in a cost-effective and timely manner. Timeliness is especially critical for companies that continually develop new products or services that the agents must be prepared to discuss with customers.

Studies have shown that corporations that offer ongoing training and education have a higher level of retention and a better skilled workforce. But, time spent away from the job traveling or sitting in a classroom reduces CSR productivity and decreases revenue tremendously. This begs several questions – how can you keep agents productive while providing ongoing education? How can you deliver the same consistent training to remote agents? How do you teach agents how to handle irate customers, how to upsell, and how to graciously take no for an answer? Plus, how can you effectively provide current product information that the agents need to be informed about? The answer is simple – use industry standard tools to create the courseware, and make it accessible to people when they want it, and how they want it. Training and learning can be used as a competitive weapon, and companies that explore new and innovative ways to provide training will come out ahead.

### e-learning, Monitoring and Performance

Knowing which agents need to be trained, and what they need to be trained on is almost as important as quality training itself. Many companies and call centers have found that the best bet is to base the training on agent monitoring and performance evaluations. Integrating e-learning with monitoring and performance evaluations can help drive continuous performance improvement. Companies have also found that automated evaluations based on monitoring sessions reveal where training is needed, making the training more effective. Rather than relying on stand-alone applications, contact centers can be more effective when there is a closed-loop process of monitoring, evaluating, and e-learning.

Recording and analysis software and products provide the ability to record, evaluate and analyze complete customer contact based on user-defined business rules. Analyzing overall performance provides companies with the information needed to make changes, identify training needs, and coach CSR's to ensure the most effective and efficient customer interaction, optimizing customer relationships. For example, Witness Systems' customers note that the results of their eQuality Evaluations are what they use to drive both coaching and training.

e-learning applications complement contact center quality assurance programs by identifying training opportunities



*Witness Systems' eQuality Now software triggers prioritized e-learning delivered straight to your CSRs.*

to offer personalized on-line mentoring. Until now, turning the information that comes from analyzing performance into targeted training and mentoring, and identifying skills that need training has been a manual process. With average supervisor to agent ratios for 17 to 1, you can imagine this can be a consuming and often impractical manual task.

The good news is that by automating this function, the tedious, time-consuming manual process can be eliminated, thus increasing productivity while ensuring that all important elements are covered in the training, and nothing is omitted.

By having a direct closed loop performance environment, contact center managers and supervisors know that agents are getting the training that they need. Even better, they can go back and evaluate the training. The system can see that an agent went through specific training and the supervisor can closely monitor the agent for that skill during the next evaluation, and can then re-evaluate how much (if at all) the agent has improved in that skill. If the evaluation shows that the agent scores on that skill did not improve as expected, the training system can be tweaked and improved – hence, the closed loop.

Aside from being well-trained, customer service reps ultimately become more satisfied. They feel that their company is supporting their career path and helping them to grow in their careers. Companies have found that immediately after their CSRs go through training they become highly motivated and more effective.

With e-learning, the CSRs don't have to travel to training classes, and can learn from the privacy of their own homes, or wherever they choose. This is especially beneficial for remote agents, who receive the same consistent training as agents that work within the call center.

### Conclusion

Customer service agents have long been the front-line to customers, and providing the appropriate tools needed to agents and supervisors is an essential way of optimizing customer relationships. Through monitoring, evaluation and integrated (automated) e-learning, companies can help ensure their customers interact with enthusiastic, motivated CSRs, and obtain consistent service via Web, e-mail or the telephone.

# Optimizing customer relationships

Witness Systems provides recording and analysis software that enables companies to enhance their customer interactions across multiple communications media. Its eQuality™ suite of products is designed to further extend the ability to record, evaluate and analyze complete customer contact based on user-defined business rules. Witness Systems' software is deployed by contact center managers as a training tool to improve the performance of agents. Results from these recordings can then be combined with other service delivery metrics, enabling organizations to monitor and analyze their sales and service performance.

Witness Systems' eQuality applications start with business-driven recording designed to provide the ability to monitor customer interactions no matter how they take place – over the phone, through email, or through interactive Web chat. By monitoring interactions, supervisors can evaluate the effectiveness and efficiency of people, processes and technologies such as:

- How well agents respond to customers,
- How well upselling processes work, or
- How effective your new CRM implementation is.

These interactions can be evaluated and automatically scored, and the evaluation scores can then be combined with other service delivery metrics like productivity statistics, sales information, customer satisfaction survey results, and CRM information, in order to provide an overall view of performance.

The latest addition is Witness' eQuality Now™ integrated electronic learning management solution, a targeted electronic e-learning application that complements contact center quality assurance programs. By integrating with the eQuality™ suite of multimedia recording and analysis software, companies can identify training opportunities to offer personalized on-line mentoring.

By recording customer interactions, evaluating agent performance, and then using those evaluations to prioritize training, contact centers have an integrated, closed-loop system for applying organizational learning.

eQuality Now focuses on e-learning opportunities in the contact center arena, such as new product and service introductions; sales, upselling and cross-selling techniques; and tips for managing customer communications through newer communications channels, such as e-mail and collaborative Web chat. It is a direct, closed-loop environment that lets companies record and evaluate customer interactions, assess competencies, and deliver targeted training.

As shown in Figure 1 (left), eQuality Now, a browser-based application running on the Microsoft™ Windows NT™ Server enables call center supervisors to record and evaluate contacts, assess agent competencies, define CSR aptitudes, map evaluation sections to skill sets, identify disparities, and provide immediate Web-based training. Companies can deliver industry-standard courseware, providing



*Fig. 1: The direct, closed-loop performance environment of the eQuality Now e-learning management solution.*

“chunks” of training that agents can access from any desktop. By providing “chunks,” or small nuggets of training, information can be delivered in modules, eliminating the need to sit in a six-hour course. Rather than replacing traditional coaching, these tools are used to supplement and automate the current process.

Witness Systems is working with a variety of complementary technology partners that combine to deliver a total e-learning solution, including on-line learning solutions geared to agent soft and hard skills; the maintenance of an agent skills inventory for use with skills-based routing and scheduling software; and a library of ready-to-use courseware.

The eQuality Now e-learning management solution helps companies optimize customer relationships, while providing the training required based on agent evaluations – creating a competitive weapon in the Internet-enabled contact center.