

Case Study Archive:

## Career TRX

### SXC University (2006)

**PROBLEM** The client was going through a growth period and all departments were experiencing pain in staffing. As a result, employees rotated quickly out of the call center (the main entry into the company) and into positions in other departments. At the time, the call center trained new hires by having them sit with someone more experienced for a day or two and then started answering customer calls. The ramp up to skill mastery was about four months. The informal training method, coupled with the ramp up time and turn-over in the call center resulted in inconsistent transfer of information and skills. The goals of the project were to:

- Create the framework for an intern program that would help with immediate staffing needs and build a recruiting stream for the future.
- Shorten the time to mastery of tasks for new hires in the call center.
- Improve overall productivity in the call center.
- Increase use of Call Tracking software to document calls.

**SOLUTION** The first phase of the project was to document a series of potential career tracks starting with the recruitment and hiring of interns and showing opportunities for progression through the company. The second phase of the project was to create an on-boarding that addressed three training needs: Telephone Customer Service Skills, Insurance Clients Policies/Procedures and use of the company's proprietary software. We updated and formatted client policies and procedures to be consistent and more user friendly for look-up. We also created a half-day customer service workshop where new hires could listen into calls and practice researching and responding to customer inquiries. Finally, we created structured on-the-job training procedures and a schedule of progression of skills so the side-by-side training would be more consistent and effective. Two call center associates were given a promotion to take on the role of SOJT trainer creating a reason to stay in the department. The call center manager delivered daily feedback from the phone system to the team on identified key performance indicators. Individual feedback was given weekly.

IMPACT

Ten existing employees and four new hires completed the training over a 4-week period. Existing employees reported an increased confidence in using the system. The department manager also saw an increase in the number of calls entered into the Call Tracking software as well as improved quality of entries related to problems and how they were solved. All employees reported seeing the benefit of entering historical call history into the Call Tracking software so it could be used to research problems someone else on the team had resolved. New hires were at mastery at the end of the 4-week on-boarding period - thus reducing the time to mastery to onboard a new hire from 4 months to 1 month.