

Facilitator Guide
Group # 8
“Identifying and Managing Performance Challenges”

Audience for this Module:	Call Center Supervisors Interviewer Trainers Call Center Floor Managers
Goal of this Module:	<p>By the end of this module the call center supervisors, interviewer trainers, and floor managers will be able to successfully:</p> <ul style="list-style-type: none"> - Determine objectives new hires must meet to graduate the induction or introductory interviewer training program - Devise methods of measuring trainee performance and communicating performance to production floor supervisors - Determine objectives for new interviewers once they reach the production floor - Determine methods of measuring new interviewer performance on the production floor - Identify ongoing training or up-training necessary to improve new interviewer performance - Benchmark current interviewer performance to establish a new interviewer learning curve - Implement the steps in the performance management cycle - Identify and reduce impact of the areas that define poor performance - Adopt and utilize the six steps of handling poor performance into their everyday routine
Logistics: Materials, Room type/setup, Time needed, etc.	<ol style="list-style-type: none"> 1. PC and LCD Projector 2. Flip chart paper and markers 3. Tape 4. Wipe off board and markers 5. Print out of "Trainee Report Card" for each participant 6. Print out of "FAST Feedback" take away for each participant
How to make the most of this Module:	The presentation is customizable to meet with your company's standard procedures and protocols, so long as it does not substantively change the content or nature of the training modules.
How to assess learning:	Along with questions and answers during the PowerPoint training, activities will allow you to assess learning while reinforcing the material from the module. In addition, an exam is provided in the addendum to assess learning.



Group VIII

“Identifying & Managing Performance Challenges”

Facilitator Guide

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INTRODUCTION

The “Call Center Administration: Interviewer Assessment” group is designed for supervisors to assist in facilitating a positive, collaborative, work environment for telephone interviewers. Areas explored are: interviewer performance evaluation, coaching other performance measures, and identifying & managing performance challenges.

All presentations can be used individually or in combination to train new interviewers or to enhance the skills in experienced interviewers.

OVERVIEW

This module outlines for call center supervisors, interviewer trainers, and floor managers the areas in which interviewer performance should be monitored and evaluated. This module also provides call center supervisors and floor managers strategies for ongoing performance management and improvement of production floor interviewers.

OBJECTIVES

By the end of this module the call center supervisors, interviewer trainers, and floor managers will be able to successfully:

- Determine objectives new hires must meet to graduate the induction or introductory interviewer training program
- Devise methods of measuring trainee performance and communicating performance to production floor supervisors
- Determine objectives for new interviewers once they reach the production floor
- Determine methods of measuring new interviewer performance on the production floor
- Identify ongoing training or up-training necessary to improve new interviewer performance
- Benchmark current interviewer performance to establish a new interviewer learning curve
- Implement the steps in the performance management cycle
- Identify and reduce impact of the areas that define poor performance
- Adopt and utilize the six steps of handling poor performance into their everyday routine

Points of Focus:

Slide 2:

"Module Objectives"

The Trainer should review the module objectives. The goal of this module is to provide call center supervisors with guidance in identifying and managing interviewer performance challenges at the training and production stages.

Slide 3:

The Trainer should ask one participant to read the slide aloud. Afterwards, he/she should ask the group to answer the question with a show of hands: who thinks the statements are true, who thinks the statements are false.

Ask for volunteers to explain their answers.

Slide 4:

The statements on the previous slide are false.

At times, we do hire individuals that do not perfectly meet our hiring criteria, or we think they do but when they get to training they aren't as successful as they were during the hiring process.

The same applies for training. We evaluate trainee performance, and the new hire meets the training objectives and measurements so they graduate. Sometimes we graduate trainees who are slightly below meeting the objectives thinking that they will improve with more experience.

Performance management is one of the most important responsibilities a supervisor has. It takes place with poor performers, those that are meeting objectives and those that are exceeding objectives.

It is an ongoing cycle of identifying performance challenges, providing the necessary feedback and development, and measuring success.

Slide 5:

As stated earlier, we are going to be looking at two key areas where identifying performance challenges and managing interviewer performance are very important – induction training and production floor.

Induction training is that initial training that every newly hired interviewer receives. It includes both an orientation to the company, office, and job as well as training on how to perform the interviewer job effectively. New hires may experience more than one induction training period dependent on their performance and ability to meet training objectives at an acceptable level.

Production floor is after a new hire has graduated from induction training and is ready to work on live projects.

Slide 6:

"Identifying Performance Challenges: Why is it necessary to identify and address performance challenges?"

Ask the participants to answer this question. "Why is it necessary to identify and address performance challenges early?"

You may wish to record some answers on the wipe off board on a flip chart.

Click the mouse to bring up the three areas.

Development: Evaluating performance and identifying areas of challenge are important steps in determining what development or additional training a new employee will require. Without continued development and training we cannot expect a poor performer to meet our expectations or a good performer to continue to experience success and grow to the next level.

Turnover: Ask the participants what they think of when we link performance management to the word turnover. Most answers will center on quickly identifying those individuals who do not meet minimum performance objectives and need to be released from the company. That is one aspect of evaluating performance and identifying challenges.

The other side of the coin is that through the same process of evaluating performance and identifying areas of development; we are working to reduce our turnover. Given the cost of recruitment, hiring, and training, helping underachievers move from poor to acceptable performance is more worthwhile than dismissing underperformers and starting over with a new person.

We do this by showing the new employee that we are concerned with their success, this improves the relationship between the interviewer and the supervisor as well as providing the interviewer the necessary development to improve.

Motivation & Job Satisfaction: Managing performance can also lead to increased motivation and job satisfaction on many levels. Identifying performance challenges and providing the necessary development and training increases the motivation and satisfaction on the part of the under achieving interviewer. It shows we are concerned with their success and are taking helpful steps to assure they improve. This increases the necessary bond between supervisor and interviewer that is an important aspect to motivation.

Additionally, showing that you are evaluating, improving poor performers, and taking necessary action helps to motivate those that are working at acceptable levels. They see that improvement is occurring and that they will not have to continue to take on the work/objectives that poor performers are not able to provide.

Supervisor motivation and satisfaction occurs because they are able to see the results of their actions through improved performance. Other supervisors are more likely to use these people on their jobs since the interviewer's performance is improving.

Slide 7:

Ask participants to answer the questions "Is there such a thing as the perfect hire?"

Ask the participants to support their answers.

Further ask, "How do you determine the applicability of the applicant to the interviewer positions?"

A click of the mouse will bring the points up on the slide.

The hiring stage has set criteria that applicants must meet to be considered for employment. These are tested through hiring test and job simulations. Skills such as:

- ✓ the ability to read verbatim
- ✓ accurate and efficient data entry
- ✓ ability to follow verbal and written instructions
- ✓ voice quality and phone demeanor

At times, applicants are hired who do not completely meet the requirements. Perhaps there is an emergency project where we need people quickly and we hire those that we feel will be successful in these areas with just a little experience. Perhaps the applicant has met the hiring requirements but then doesn't show this performance during induction training.

Communication between the Recruiter and Trainer is extremely important at this stage. Trainers need to know where the new hire falls in relation to the hiring requirements as they will be evaluating if these skills are improving and strengths are being maintained during training.

Slide 8:

Ask the participant to answer the question on the slide – "Why evaluate performance during induction training?"

A click of the mouse will bring the points up on the slide.

There are three decisions that need to be made before the end of induction training.

1. **Graduation:** The Trainee has met the minimum acceptable performance in each of the training objective areas or the Trainer (usually along with the Supervisor the new interviewer will be going to) has determined that any deficit areas are minimal and will improve with further development and experience on the production floor.
2. **Maintain:** The Trainee is not meeting minimal performance requirements to graduate from training. The Trainer (sometimes with input from the Supervisor) determines that they will meet minimum requirements with additional training in the identified areas. This additional training will be delivered by the Trainer, and the trainee will return to the next training program for this additional development.
3. **Terminate:** To separate or dismiss the Trainee – the Trainer has evaluated the Trainees performance against set training objectives and found that the Trainee does not meet these objectives and will not improve with additional training

Slide 9:

Ask the participants to answer the question on the slide.

Discuss as a group and require that those giving an opinion support their answer.

A click of the mouse will bring up the bullet points.

The answer to this question is "NO". Not every new hire will graduate the training program. However the majority should if a good hiring/screening program is in place.

Ask the participants, "How should the decision to graduate a new hire be made?"

The decision will be based on multiple inputs:

- How is the trainee progressing on the weaknesses and strengths that were identified during the hiring process?
- Are the weaknesses improving to an acceptable level?
- Are the areas that were identified as matching the necessary skills of a successful interviewer being maintained?

Every training program should have identified objectives the trainee is required to meet before they graduate from the initial training program. These will vary to some extent depending on the type of phone work being conducted within the call center. These objectives should tie into the areas "tested" during the hiring process as well as those areas that are reviewed during the training program.

- ACTIVITY SUGGESTION -

Conduct one of the following activities before proceeding to Slide 10

If your call center does not have an established set of training objectives you may wish to begin to establish those at this time with the group participating in this training module. Use the "Determining Training Objectives" activity.

If your call center already has an established set of training objectives this would be a good opportunity to review and calibrate the objective measurements to assure that both the training and production departments have the same expectations of a trainee performance.

Slide 10:

This slide contains some suggested training objectives.

Reading Verbatim: It should be expected that, by the end of the induction training program, trainees should be reading verbatim 100% of the time. This would include only minor mistakes that happen infrequently.

Accurate data/code entry: By the end of the training program, trainees should understand the importance of accurate data entry. Starting with dispositioning calls correctly to entering the respondent's answers correctly. It would be expected that this is performed with 100% accuracy, with only minor mistakes occurring. This could include confusing an answering machine and a privacy manager or a refusal for a callback.

Recognizing and reacting to refusals: It is going to take a little time before a new hire can successfully convert a majority of the refusals they encounter. During induction training we would expect the trainee to recognize the situation and respond with an appropriate clearing or pat response. Do not expect that the trainee will successfully convert the refusal.

Identifying call-backs: A challenge for trainees is often determining the difference between a refusal and callback. As with refusals, trainees should be able to recognize that the respondent is requesting a callback or that a callback appointment is necessary. Trainees should successfully use the standard callback request and set the appointment time correctly in the computer. Trainees shouldn't be expected to successfully negotiate with the respondent at this time, but recognize that a call back is necessary, ask for it, and set it correctly. Negotiating more productive calling times and using callbacks to convert a possible refusal will require more experience.

Getting answers to the questions: Trainees should successfully recognize the "don't know" and non-response answers and respond correctly by the end of the induction training program. Trainees should be able to recognize when a respondent is not answering the question. This would include the "don't know" response or the respondent not answering the question with the choices given. The trainee should identify this situation and respond with the correct pat response of clearing.

Willingness to accept and implement feedback: Induction training is a short period of time, meant to give the new hire a base of information and performance that should continue to be developed by the production floor supervisor. Because of this, it is important that the trainee be able to act successfully on the feedback received from the trainer. This objective requires that the trainer begin to evaluate trainee performance as early in the training program as possible so that feedback can be delivered early, the trainee has an opportunity to implement, and reassessment can occur.

Voice Qualities and Skills: Although this skill requires more practice than can be made available during the training program, trainees would be expected to have a smooth and confident delivery by the end of the training program. Trainees should be able to move smoothly from question to question. To have a steady pace and volume, though they may not successfully change these to match the respondent. Under this objective the trainer should be looking for consistency at this point.

Maintains the Respondent Relationship: This can be a stressful job for some people, having to deal with irate respondents and convert refusals on an ongoing basis. Trainees should be able to move to the next call successfully and not allow the previous call to impact the new respondent. Additionally trainees should be expected to maintain a professional assertive attitude with each and every respondent. Any rude or inappropriate treatment of the respondent should not be tolerated as these respondents are the same respondents that production calls are reaching.

Slide 11:

Because induction training is such a short period of time, it becomes more important that the Trainer "Attend to the Situation" quickly, meaning that the Trainer needs to identify and address performance problems quickly. Attending to situations means not only identifying the areas of performance concern but addressing these with the new hire and communicating continued areas of concern onto the new interviewer's supervisor.

- ACTIVITY SUGGESTION –

Ask the group- "What means could the trainer use to identify performance challenges on the part of the trainee?" These could be listed on the wipe off board or on a piece of flip chart paper for comparison to the items listed on the slide.

Compare and discuss how the two lists are similar and different from each other.

Monitoring trainee calls: If possible the training program should include a live dialing aspect so that trainees can practice new skills in real situations. The Trainer should monitor these calls, either in real time, or by recording. This is the best way to evaluate the trainee's performance and implementation of their skills. The evaluation of these calls should address the objectives that have been put into place for the training program. Feedback should be given to the trainee on each call that is monitored. The Trainer should follow the steps of giving good feedback.

Observation of role-play activities: The Trainer should observe the trainees as they participate in role play activities with each other. This is a good opportunity to give feedback and to identify developmental areas that need to be addressed in the classroom setting. Additionally the trainer should note if particular trainees are experiencing the same problems over and over again.

Review of calling reports: During induction training, Trainers should not evaluate trainee performance based on the number of surveys they complete for the time they spend on the phone. During the training program, Trainers should evaluate call dispositions and incidence rates – evaluating these measurements against the other trainees in the class as well as historical data. This will allow the Trainer to identify if a trainee is correctly or incorrectly dispositioning calls and if they are having problems negotiating the screener portion of the survey. Comparing to other trainees will allow the Trainer to identify if there is an isolated problem or if there is a possible problem in the way the information was delivered.

Testing: Testing the trainee's skills can be accomplished in a few different ways. This could include written quizzes and exams or simulations that the trainee has to complete. Each has the objective of testing the trainee's comprehension of the information delivered during the training program. However don't rely solely on written test results to evaluate trainee performance as they may comprehend the information and be able to successfully put it into action but may not test well.

Simulations are a good alternative to the written test. These could be as simple as having the trainee call a supervisor and conduct a survey with them. Predetermined responses from the Supervisor would allow the Trainer to observe the trainee on the phone and assure that all the training objectives are tested during the call.

Observation of Class Participation: Does the trainee seem hesitant or meek when asked a question? Do they hesitate to participate in classroom activities? These could be signs of a lack of assertiveness which may affect the trainee's ability to interact with the respondent in a positive fashion and convince them to participate in telephone research surveys.

Quality of questions: Observe whether trainees are answering/asking questions and evaluate the quality of both. Are the questions being asked relative to the current topic? Are they the same questions over and over again? Do they seem to be questions asked for the purpose of wasting time only? Any of these can be a red flag for the trainer indicating a misunderstanding, lack of attention, or willingness to learn.

Attendance: It should be required that a new hire have perfect attendance during the training program. It is not out of the ordinary to assume a new hire would be "on their best behavior" when they first start a new job. If attendance issues are occurring during the training program it is not unlikely that these will follow the trainee onto the production floor. While the other trainee objectives usually are looked at in conjunction with each other, that is, lacking in one is usually not a reason to terminate. Attendance alone can be a reason to let a trainee go during the training program.

Before proceeding to the next slide, introduce the "Trainee Report Card" as a means of communicating trainee performance to the production floor supervisor.

Slide 12:

An important part of interviewer retention, is the development of the new interviewer so that they may be as successful as possible in their role. With this in mind, there are many reasons to evaluate performance once a new hire has successfully graduated the training program.

You will need to evaluate, to assure those areas in which performance were deemed to meet expectations in the training program, are maintained and are improving.

You will need to offer development in those areas identified by the trainer as being weaknesses in the trainee's performance.

You will be continually identifying areas of interviewer development, either a weakness that needs to be improved or an area that needs additional development, to move the interviewer to the next stage of performance.

As part of your project evaluation, you will be identifying interviewer performance that may impact the production or quality of the project itself. Remember that you are not only identifying the negative influences, but those that are affecting the project in a positive way.

Lastly, you are evaluating performance on an ongoing basis, to help determine if the interviewer will be successful in this type of work. If it is determined that the interviewer cannot improve and sustain the necessary levels of performance, you may have to make the final decision, and terminate the interviewer.

Slide 13:

Click to bring up graphic

"What to evaluate?"

Ask the participants to answer this question – "What areas of performance should an interviewer be evaluated on once they reach the production floor?"

There will be many areas, most coinciding with those areas that are included in your office's/company's current monitoring and evaluation forms. These specific attributes can be grouped into two main areas comprising Production and Quality.

You may wish to record some of these on a wipe off board or flip chart to categorize them under quality or production when you discuss the next slide.

Slide 14:

"What to evaluate?"

This slide lists some of the specific attributes that would fall under each main heading of Production and Quality.

Before bringing the list up on the slide (with 2 clicks of the mouse) ask the group to identify performance attributes that would fall under each category.

These can be adjusted to the measurements and terminology used by your office or company. If you recorded the suggestions from the participants at slide 13, ask the group to categorize these under one of the two areas.

Slide 15:

Ongoing monitoring is necessary, so that the supervisor can evaluate the new interviewer's performance and identify what development is necessary.

Reviewing dialing and production reports, will give the supervisor indications as to where they should focus their monitoring rather than monitoring blindly in the hopes of just running across the new interviewer's challenge areas.

Slide 16:

Ask the participants to answer the questions, "Should we retain every new hire?"

A click of the mouse will bring up the points on the slide.

Unfortunately, the answer to this question is "no." Some new hires, although they graduate the training program, are not a good match for this position.

Yes, some imperfect matches will seem great during the hiring and training process, but will falter when they reach the realities of the production floor.

Later in this module, we will be discussing performance management which will help the supervisor in managing interviewer performance and how to better make this decision.

An important point to note is that the supervisor should understand that new interviewers will improve and the supervisor should be looking for forward progress towards more acceptable performance levels and should not expect the new hires' performance to immediately meet minimum acceptable levels.

Slide 17:

"The Production Floor"

Ask the participants to answer the question, "Should new interviewers have the same performance expectations as more experienced interviewers?" Ask the participants to support their answers.

The answer to this question is "No," at least in the beginning of the new interviewer's time on the production floor.

Slide 18:

Each office should determine the learning curve of new interviewers; how long it takes the average new interviewer to reach minimum acceptable levels of performance in the two key areas of production and quality.

The important thing is that new interviewers should be making forward progress, increasing their interviewing skills and production. The new interviewer should be implementing the feedback and additional development they receive in order to reach the levels that have been established as acceptable performance within the identified timeline.

Slide 19:

So far, in this presentation we have discussed at what stages to evaluate interviewer performance and what performance areas to evaluate.

Going forward, the module will focus how to manage the performance of the interviewer on an ongoing basis.

Slide 20:

The important points to note on this slide are that performance management is a process to help assure that the employee is successful in their role. Additionally, it is an ongoing process that has no end.

Slide 21:

This slide shows the steps in the performance management cycle. Slides twenty-two through twenty-seven detail each step individually. As we have identified, performance management is an ongoing process that really has no end. Its focus may increase or decrease at different times in an interviewer's career, but it does not cease after one concern or challenge has been met. It continues as new challenges are identified, as well as is part of increasing the level of performance of interviewers who are meeting and exceeding performance objectives.

Slide 22:

Click to bring up content.

One of the first encounters a new interviewer should have with their supervisor should be the conversation regarding the performance expectations of the interviewer and how the supervisor will assist them in meeting their objectives.

This conversation should not only include what metrics the new interviewer's performance will be measured against, but also how they will achieve these measurements, how they are collected, how their skills as an interviewer directly impact these metrics.

This information may have been discussed during orientation and interviewer training, but should be reinforced once the new interviewer reaches the production floor.

All follow up discussions and feedback sessions should reinforce this information.

Slide 23:

Click to bring up content.

Do not assume that a new interviewer will "get it" with enough exposure and experience. Performance management is an ongoing process. Continuous monitoring is required in order for the supervisor to determine the current level of performance and what development will be needed.

Monitoring goes beyond only listening to the interviewer's calls, it includes reviewing interviewer reports, identifying areas of concern, and then monitoring these areas to guide the supervisor to deliver the necessary feedback and development.

Additionally, talk to the interviewer. Find out from them their areas of concern regarding their performance. Ask them in what ways the supervisor can help them to improve and meet the performance expectations that have been communicated to them.

- ACTIVITY SUGGESTION -

Before proceeding to slide 24 consider using the "Elements of Good Feedback" activity.

Slide 24:

Click to bring up content.

In order for the new interviewer to understand how they are performing, consistent feedback is required. There are many forms in which this communication can be delivered; the most important point is that the feedback be timely and constructive and delivered on a regular basis.

An important point to note is that new interviewers will need more feedback *and* on a more frequent basis than more seasoned interviewers.

Review the handout "Rules for Good Feedback"

Slide 25:

Click to bring up content.

A natural next step to monitoring performance and providing feedback is to partner with the new interviewer to determine the additional training and development they will require to meet minimum acceptable performance levels and then to exceed these to move above expectation levels.

This development can be delivered in multiple ways. It may require something as easy as a short re-briefing, a refresher module, or sending the new interviewer back to training for review of a key skill. Regardless of what means the training takes, the important part is that the supervisor has recognized the developmental need, reviewed it with the employee, partnered with them to determine the necessary actions, and implemented them with a timeline in mind.

Be sure to express the WIIFM (What's In It For Me) aspect of development and training. How the training will lead to improved performance which can result in receipt of reward and incentives for the new interviewer.

Slide 26:

Click to bring up content.

With any action taken as a supervisor, documentation is important. This documentation can take the form of completed monitoring forms, performance plans, counseling forms, or disciplinary forms. Documentations should first be used to map where the employee currently is; their level of performance and the development they have already received. This information should first be used by the supervisor to plan out their employees' future needs for training and development. Then, if necessary, as part of the disciplinary process.

Regardless, the supervisor is often the only witness to what has been occurring; written documentation acknowledged by both parties is very important to the performance management cycle. Additionally employees will often take feedback more seriously when it comes in written form. It serves as a record and roadmap for the employee to use in improving their own performance.

Review the "Commitment to Correct" document at this time.

Slide 27:

Click to bring up content.

As stated earlier, performance management is an ongoing process. It begins when the new interviewer joins the company and it does not end until they day they leave. The ability of the supervisor to manage the new interviewer's performance and assure the interviewer clearly understands what their job is *and* how to perform it

successfully, will help to determine the amount of time between the two points in the employees time with your organization

Slide 28:

There are many issues that can contribute to poor performance. Some are related to the employee themselves, others can be attributed to the organization.

Ask the participants to identify what they think are factors that can drive poor performance. Record these on a piece of flip chart paper to compare to the list included on the slide.

Mention the list on the slide.

Some issues that directly affect the performance of employees and eventually the organization include:

- Lack of knowledge or skill
- Unclear expectations
- Lack of support
- Inconsistency from supervisors or managers

The next few slides will discuss each of these points in more detail.

Slide 29:

Click to bring up content.

Lack of knowledge can be a common problem among supervisors, thinking that new interviewers will "figure it out for themselves" given enough time on the production floor. Every new interviewer needs to receive the proper knowledge and training to effectively function in their roles.

Without initial and ongoing training and development, an interviewer cannot be expected to meet any type of performance objectives.

An important note to stress to the module participants when providing training is that the interviewer not only is told what to do but they need to be told and shown how to do it as well. This helps to impact the different styles of learning that an interviewer may have.

Sometimes the job is just not the right fit for the employee. The employee lacks the aptitude, drive, or skill for the job and may never be able, or willing, to do the tasks set for them or reach acceptable performance levels.

Slide 30:

Click to bring up content.

New interviewers may understand what is required for them to do their job – talk to respondents and get completed interviews. However they may not understand or may not have been given any performance expectations. Without communicated expectations, interviewers will equate good performance with doing as much as they can to get respondents to talk to them, rather than relating their actions to reaching established performance criteria.

The supervisor must have a one-on-one meeting with the new interviewer to communicate how their performance will be measured and what you will do together to assure the new interviewer is successful.

Ask the participants if they can recall step five in the performance management cycle – record keeping. It is important to not only have performance and goal setting discussions with the new interviewer but to put these in

writing when ever possible. Employees are more likely to take the goals and timelines more seriously when they are documented in writing.

Slide 31:

Click 2 times to bring up content.

Most interviewers state that support from their supervisor is essential for their motivation and job satisfaction. Ongoing performance monitoring, identification of performance challenges, and delivering of necessary training and development indicates a dedication to the new interviewer's success.

The partnership with, and support of, the new interviewer will increase the new interviewer's confidence, increase their involvement, and allow them to strive to do their job better.

The supervisor's role is to create a supportive environment for the new interviewer. Discuss with them what they require from you to become better performers.

Increased interaction between the supervisor and interviewer allows the supervisor to understand the interviewer's issues and be more specific in the "help" they deliver to the interviewer.

Slide 32:

Click 2 times to bring up content.

Mixed messages, unclear directives, and the lack of consistent measures are some of the root issues that can impact the success of the new interviewer.

The new interviewer is unfamiliar with the processes and procedures in place that can help them to perform at acceptable levels. They look to their supervisors and managers to give them consistent answers and feedback. Conflicting messages and opposing feedback can be a key cause of a new interviewer's performance issues and decreased motivation.

Sometimes the problem can be the lack of attention that the supervisor is giving to the interviewer. Remember, we cannot expect that the new interviewer will "get it" with enough time and practice. The new interviewer will need your consistent and correct attention in order to reach an acceptable level of performance.

An important note to make to the module class participants is that they shouldn't forget those interviewers who are performing at acceptable or exceptional levels. Don't forget to give attention and support to those interviewers who are doing well on their own, so they do not begin to feel neglected.

Slide 33:

You have identified and communicated the necessary performance objectives and expectations to the new interviewer. You have reviewed performance on a consistent basis and delivered constructive feedback, along with development and training. Unfortunately, some are still not performing at acceptable levels. The next few slides discuss the steps in addressing poor performance.

Slide 34:

Before clicking the mouse to bring up the slide content, ask the participant what they think it means to "Attend to the situation?"

Poor performance should be addressed as early as possible. If you wait too long you will lose the opportunity to provide necessary development and have the new interviewer accept and implement the feedback and training.

Avoid falling into the misconception that poor performance will correct itself if you just wait long enough. This will lead to decreased job satisfaction and motivation on the part of the employee, leading them to feel the supervisor is not supportive or interested in their success.

At the same time "Attending to the situation" applies to recognition and a pat on the back. Just as you shouldn't assume that the interviewer will improve their performance on their own; don't assume the interviewer knows that you appreciate their efforts without you actively bringing that appreciation to their attention.

Slide 35:

Before clicking the mouse to bring up the slide content, ask the participants to define the statement "Recognizing the issue."

Before having a performance improvement conversation with the new interviewer, make sure that you have reviewed the available production reports and monitoring evaluations. Make certain that the problem that is identified is supported by both of these resources.

Bring these to the discussion with the new interviewer so that they can see your feedback is supported by the necessary evidence. Lastly be sure that the feedback includes how the current behavior or performance is impacting the project or team.

It is important to note to the participants that it is not enough to identify a concern; the supervisor must support the concern with documentation that "proves" there is a problem and the effects the problem is causing.

Additionally, when recognizing good performance it is equally important to provide the proof of the impact the positive performance is having.

Slide 36:

Provide a secure neutral environment where the interviewer will feel comfortable speaking with you. Use the notes prepared from steps one and two of the process to bring the performance concern to the interviewer's attention.

Additionally, provide the interviewer opportunity to state their concerns and perceptions.

People want to be involved in their respective roles to improve their performance. Interviewers know their job best so allow them to share ideas and provide suggestions on how to improve the situation.

Slide 37:

Before clicking the mouse to bring up the slide content, ask the participants to define how the interviewer should be involved in the performance management process.

Just as with feedback, your developmental discussions should also be balanced with the areas the new interviewer is excelling in. Don't focus only on the weakness areas. Your performance discussion with the interviewer should reinforce what the employee is doing and how they have met some performance expectations.

Additionally point out how the interviewer's areas of strength can be used to increase their performance in those areas where they are falling short of expectations.

Include the interviewer in this portion of the discussion, allowing them to show where they have been successful and helping to identify how their successes can be used to help improve their areas of challenge and help them to meet expectation.

Slide 38:

As with each phase in managing poor performance, work with the interviewer to break their performance objectives into more manageable chunks. Avoid overwhelming both the new interviewer and yourself by requiring all performance weaknesses to be improved at the same time.

It is important to set the interviewer up to succeed so that they are more motivated and see that you, the supervisor, are invested in their improvement and success.

It should be noted that, in the end, it is the interviewer's responsibility to improve their performance. They ultimately own their problems and the process to improve. The interviewer must make the final decision to implement the training and development that they receive from their supervisor.

This is not to say that ultimately there is nothing the supervisor can do if the interviewer chooses not to improve. The supervisor must find the correct motivation that will "drive" the interviewer to implement the training and improve their level of performance.

Slide 39:

The first step in assessing the new interviewer progress is to assure you have documented the starting point. A performance plan is a good way to record your conversation, outline the improvement goals, identify the development that will be delivered, and set the target milestones.

As time passes, refer to this document to assess how the new interviewer is improving. Reassessing progress incorporates the performance management cycle. You are identifying clear objectives and expectations, monitoring performance, providing feedback and development, keeping a record of performance, and then meeting with the employee to discuss how they are progressing on their performance plan.

Slide 40:

Remember, our main goal is not to terminate those interviewers who are struggling. A large amount of time and expense has already been invested in their recruitment and hiring.

The goal is to identify as quickly as possible the areas of challenge an interviewer is facing and provide the necessary development to increase their performance.

By implementing a solid performance management plan, you are showing the interviewers you are vested in their success. This will increase their motivation and job satisfaction leading to interviewers who will enjoy their job, be more successfully, and be more likely to stay with us longer.

***** Please note that an exam is also provided with the Facilitator Guide to assess learning from the course. *****

Activities & Materials

Activity – Determining Training Objectives

Activity Objective: To identify the objectives that each new hire's performance will be measured against during the initial or induction interviewer training stage.

Materials: Flip Chart Paper for each group
Marker for each group
Tape

Instructions: Divide the participants into groups of two or three each.
Provide each group with a piece of flip chart paper, marker, and tape

Ask each group to brainstorm the objectives by which a new hire's performance will be measured against.

Each group should divide their flip chart paper into two columns. Label column one "New Interviewer Production Floor Expectations". Label Column two "Trainee Objectives"

Ask the group to think about what they expect from a new interviewer when they first reach the production floor. Record these expectations under column one. Use these expectations to determine the objectives that will be placed in the training stage for the trainer to decide if the new hire should pass to the production floor. Record these objectives under column two.

Have each pair discuss their expectations and objectives with the group. Explaining why they chose the production floor expectations and how they feel they relate to the training objectives in column two.

After each pair has presented, as a group compile a final list of training objectives by selecting similarities from each list, and as a group determine the most important seven to ten objectives to implement in the training program.

Record these on a clean sheet of flip chart paper and post on the wall in the room.

Activity – Using the Trainee Report Card

Activity Objective: To determine how trainee objectives will be measured and communicated to production floor supervisors

Materials: Trainee Report Card for each participants

Instructions: You may wish to replace the attributes with blank lines to create a report card based on

the trainee objectives used in your facility or created after completing the "Determining Trainee Objectives"

Brainstorm with the participants the verbiage of the attributes to include as well as specific definitions for each attribute rating of U, BE, ME, and AE.

Activity – Elements of Good Feedback

Activity Objective: To determine what makes effective trainee and interviewer feedback.

Materials: F.A.S.T. Feedback Take Away

Instructions: On a piece of flip chart paper write the letters F, A, S, T down the left side of the paper, leaving space to write what the letters stand for between each letter. On the opposite side write the letters words Frequent, Accurate, Specific, Timely in a list one under the other. Underline the first letter of each word to emphasize it.

Tell participants "Since feedback is an essential component of effective training and performance management, and we know that our time is limited each day; we are going to look at feedback from a FAST aspect."

Ask the participants to brainstorm what each letter of the word FAST stands for from a feedback aspect. Remind the participants that the words must begin with the letters F, A, S, and T.

Record the suggestions on the flip chart paper to the right of the appropriate letter.

Once you have three to five options for each letter, flip the chart paper over to the other side. Pass out the FAST Feedback take away to each participant.

Explain that EFFECTIVE feedback is FAST feedback.

F – Frequent – feedback that occurs on a consistent basis is more effective feedback. Ideally feedback should take place on a daily basis. Frequent feedback eliminates surprises on the interviewer's part when it comes time for evaluation and performance discussions. As stated in our module today, you can not avoid feedback and just hope the interviewer or trainee will just figure it out for themselves. A lack of feedback will lead to negative performance and de-motivation on the employee's part.

A – Accurate – feedback should always be accurate and factual. Avoid implementing your opinion on why the employee acted as they did, stick only to the facts. Feedback should also be measurable, both from an aspect of communicating the impact of the employees actions as well as the goals and expectations resulting from the feedback. Both you and the employee should be able to tell when the goal or expectation has been reached.

S – Specific – feedback should be based on observable behavior only and not based on one's feelings or the conclusions drawn from the employees behavior. Assure that feedback is actionable, that is the employee should have control over the actions or abilities that are necessary to improve performance. Not only should the employee have the ability to make improvements, the improvements they are asked to make should be realistic and the goal achievable.

T – Timely – feedback should always be timely. Following the monitored performance as soon as possible. This helps to assure that both the employee and the supervisor will still have the situations in mind and can contribute effectively to the feedback discussion.

Activity – Closing / Summary Activity

Activity Objective: To determine how trainers and supervisors can implement the

Materials: Flip charts created during the module
Take away documents
Copies of module presentations
Writing paper
Pencil

Instructions: Review the objectives, measurement, and communication tools brainstormed and created during the presentation of this module.

Review the Performance Management Cycle, elements that define or impact poor performance, and the steps in handling poor performance.

As a group brainstorm how you will implement the areas covered in this module.

Give each participant a piece of writing paper and ask them to fold it in half from left to right. Ask the participants to label the top of the left column "Areas I Will Continue to Use." Label the right column, "Areas I Need to Implement"

Have the participants complete each column, those skills and areas they are already using with their trainees and interviewers and those skill areas they need to implement to be more effective in performance management.

TRAINEE REPORT CARD

Interviewer: _____

Hire Date: _____ **Graduation Date:** _____

Rating Scale

- Unacceptable:** Does not meet minimum level of performance
- Below Expectation:** Fails to consistently meet level of performance as expected.
Constant reminders required.
- Meets Expectation:** Consistently meets expected level of performance.
Little need for reminders.
- Above Expectation:** Consistently meets or exceeds expected levels of performance.
No reminders required.

Training Attributes

	<u>U</u>	<u>BE</u>	<u>ME</u>	<u>AE</u>
Reading Verbatim:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recording Responses:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Following On-Screen Directives:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recognizing/Responding to Refusals:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recognizing/Implementing Callbacks:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Getting Answers to Questions:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Level of Assertiveness:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Skills:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability/Willingness to Learn:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attendance:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

COMMENTS



F.A.S.T. Feedback

Frequent

- ⚡ DAILY
- ⚡ AVOID SURPRISES
- ⚡ AVOID AVOIDANCE
- ⚡ SILENCE IS NOT GOLDEN

Accurate

- ⚡ NON-EVALUATIVE
- ⚡ NO OPINIONS OR INTERPRETATIONS
- ⚡ FACTS ONLY
- ⚡ MEASURABLE

Specific

- ⚡ BASED ON OBSERVATION
- ⚡ ACTIONABLE & CONTROLLABLE
- ⚡ ACHIEVABLE & REALISTIC
- ⚡ CAN BE IMPLEMENTED

Timely

- ⚡ FEEDBACK SHOULD BE WELL TIMED
- ⚡ IMMEDIATE FEEDBACK IS MOST USEFUL
- ⚡ BOTH PARTIES SHOULD RECALL THE SPECIFIC BEHAVIOR