

Facilitator Guide
 Group # 8
 “Interviewer Performance Evaluation”

Audience for this Module:	Telephone Call Center Survey Supervisory Staff
Goal of this Module:	<p style="text-align: center;">To teach supervisors to:</p> <ul style="list-style-type: none"> • Articulate and develop a cost-savings analysis to justify an evaluation system. • Develop an effective performance measurement program for internal use. • Quantify improvement in quality and productivity in center projects once the evaluation system is in place and running for a period of time.
Logistics: Materials, Room type/setup, Time needed, etc.	<p style="text-align: center;"><u>You Will Need</u></p> <p>The trainer will need a PC and LCD Projector in order to display this Powerpoint module.</p> <p>He/she will also need a flip chart, easel, and markers.</p> <p>It is recommended that the leader of the session designate someone to take notes or write down on the flip chart, the recognition ideas the group comes up with during the course.</p> <p>The powerpoint portion of this module should take about 1 hour and 30 minutes to present.</p>
How to make the most of this Module:	<p>The presentation is customizable to meet with your company’s standard procedures and protocols, as long as it does not substantively change the content or nature of the training modules.</p>



Marketing Research Association

Group VIII

“Interviewer Assessment Performance Evaluation”

Facilitator Guide

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INTRODUCTION

The “Interviewer Assessment” group is designed for supervisors/management 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

In every call center operation, telephone interviewers are expected to meet certain standards of quality and productivity. In some operations, there may also be other performance measures applied to interviewer activity. There may be formal written standards, job duties, and follow-up performance reviews. Performance goals and reviews may be conducted on an informal or un-timed basis.

The purpose of this training module is to promote the creation and maintenance of a formal, written, timed performance evaluation system, and to teach call center managers how to establish such a system.

The module begins by reviewing the reasons for having a formal evaluation process, and then details how to evaluate various aspects of interviewer performance in conducting telephone surveys. Call center managers can use the elements in this module to develop the performance measures they want to include in their evaluation process, using the basic outline provided to create specific goals, measurements, and a feedback process to tell interviewers how well they are doing in their jobs.

Interviewers who know the goals they are trying to achieve, and who receive regular feedback on their progress, will ultimately turn out to be more productive, satisfied, and motivated to continue good performance. Interviewers with gaps in performance will have a clear understanding of the steps they need to take to meet the goals of the position. Although maintaining an evaluation system is work for call center managers, those managers achieve more success, and better project results. Managers will also experience more time for evaluations and other work if they have to spend less time correcting and motivating the interviewers because they have not received goals or reviews. The existence and use of an evaluation system is a win-win result for call center staff at all levels.

OBJECTIVES

At the end of this module, call center managers should be able to:

- Articulate and develop a cost-savings analysis to justify an evaluation system.
- Develop an effective performance measurement program for internal use.
- Quantify improvement in quality and productivity in center projects once the evaluation system is in place and running for a period of time.

Content Review

Slide 1-3:

The Trainer begins the module by showing the benefit for managers and supervisors in beginning or improving an evaluation program. The module starts with this benefit because there may be trainees who view evaluation system as burdensome. The Trainer should start by convincing the managers that evaluations can actually save time and effort in the long run.

Slide 4-10:

This section of the module reveals the characteristics that must be built into every evaluation process. Once the Trainer has explained each attribute, an effective exercise may be conducted by asking the class to choose one current goal in their organization, and examine that goal against the SMART outline. The exercise can either be done with the whole group, or the class can be broken up into smaller teams, and each team decides if the goal meets one attribute each, then reports back to the group as a whole.

Slide 11:

The Trainer introduces the class to the most common performance measures for an interviewer's job. Before showing this slide, the Trainer may want to ask the class to suggest some common areas of performance that can typically be measured in a call center.

Slides 12-18:

The first performance measure considered is 'dialing productivity.' The Trainer can explain that focus on productivity is always a game of balance between getting completes and still maintaining high quality standards. The Trainer can confirm that completes with a certain level of quality is one measure, but can explain the other types of measures that signal survey productivity, such as those listed on slides 14-15.

In this section for slides 16-17, the Trainer also deals with how to account for the "non-production" time every interviewer experiences, and the Trainer can lead the group in a discussion of how their operation recognizes and accounts for non-production time in an interviewer's performance.

The Trainer ends the section with a discussion of how to apply a score to productivity (slide 18). This is an opportunity for the Trainer to lead the class in a discussion of how to create their scoring, or to perfect the scoring now in place if it needs tweaked.

Slides 19-24:

The next performance measure is quality. The first few slides can be used by the Trainer to show one possible way to measure the quality of an interviewer's

survey. This is most likely a typical measure all survey call centers use, although they may go about the measurement in different ways. The first two slides demonstrate one approach a company has used, with an example of a monitor sheet and how to score it on slide 20. After covering these slides, the Trainer can again get the class to participate by asking the same leading questions described under productivity -- what is in place now, what could be better, and what is needed if there is nothing in place.

Slide 25-30:

The topic in this section is reliability and punctuality. Slide 25 and 26 explain how to measure reliability, and the next slide shows a possible scoring method. Slide 28 displays an approach that uses the concept of “leave” to track attendance. Slides 29 and 30 cover the aspect of being on time and punctuality.

The Trainer can make a couple of points in this section:

-call center management should be guided by company policy in setting its reliability standard, if such a policy exists. This is important so that the center does not conflict with any prevailing policies.

-if the management is going to set a policy on its own, the staff should first research laws governing time off and attendance by state, and use any HR resources available to them*. This is an important consideration so that the center does not violate any state or federal laws about FMLA, ADA, labor laws on overtime, etc.

-attendance policies should also be based on company needs and project requirements, as well as on past history and patterns the management has experienced in the past. It is no use setting a very strict attendance policy, for example, if it causes most newly-hired interviewers to default quickly and leave the company. Each management team has to find the right balance between what is needed and what is practical, in setting reliability standards.

Slides 31-36:

In this section the Trainer wants to discuss with the class how subjective measures must be evaluated as objectively as possible in an organization. Slides 31 and 32 cover some of the pitfalls and dangers that must be avoided in a company, or ones that at least the managers should be aware of.

Slide 34 explains other approaches to measuring what are called “cooperation” measures. Slides 35 & 35 suggest other possible areas to rate performance on, and present actual examples of feedback for these subjective measures.

** Disclaimer: This information is provided for guidance and informational purposes only. It is not intended to be a substitute for legal advice. CMOR advises all parties to consult with private legal counsel regarding the interpretation and application of any laws to your business.*

Slide 37-38:

As a final point in discussing performance measures, these two slides emphasize how important it is for the performance feedback to be timely, regular, and consistent. The slides also mention other opportunities managers can use timely feedback for- to increase trust and understanding. The Trainer can ask the class to think of other benefits or side activities that arise from frequent feedback.

Slide 39-42:

The module still has a final point to make: in delivering feedback on performance, the management staff has to remember to use certain style elements and communication strategies in order to make the interviewer comfortable and receptive to the feedback message. These few slides are brief reminders of points covered in much more detail in other CMOR training modules for supervisors and monitors. The theme of these slides is that how you say the message is often even more important than what you say.

Slide 43-45:

These slides include examples of feedback forms and some of the possible phrases to use. The Trainer can lead the class in a discussion of what they like or dislike about the examples, then move on to the same discussion about the current internal feedback forms if they exist. How are the internal forms different from the examples? What would the trainees like to incorporate from the examples into their own forms? The Trainer can also find out if the class has other ideas of what to include in a feedback form that are included at present in either the given example or on the internal form.

Slide 46:

The module concludes with a reminder of how critical a resource and element the interviewer is in the data collection process, and of how a strong and positive evaluation system is one key activity to obtain the highest level of performance from that resource.

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