

Developing from Agent to Management Level

CCA Standard© User Groups

Since the launch of the CCA Standard© in 2001, over 100 contact centres have successfully achieved CCA accreditation. At the end of 2004, it was agreed that the knowledge and experience garnered by these accredited organisations would benefit being shared by the group and within the broader circles of CCA members. CCA has established several working groups to examine specific topics known to be of importance within contact centres, to learn how to overcome problems, and to establish how best practice can be implemented in line with the ethos of the CCA Standard© of continual improvement.

Based on discussion held at the first meeting of the [Training & Development User Group](#), this white paper outlines the key findings of the group relating to the development of individuals from agent to first line management roles.

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Best Practice Guidelines

- Identifying Potential Talent
- Developing Staff for Leadership Roles
- Development Programme Topics
- Development Timescales
- Making External Appointments

Identifying Potential Talent

- As always, it is important to manage **expectations**, and therefore it should be made clear from the outset and to all staff that appointment is not an automatic process.
- When looking for management potential in staff, be sure to select **appropriate** individuals, and not just those who perform best in their current role. However, whilst current performance is not always the only consideration, candidates must exhibit a minimum experience or service level, and prove their **capability** and worth for consideration.
- In order to assess who the most appropriate individuals may be, determine the **competencies** required for the new role and look for examples of where these are clearly demonstrated in the work of a particular employee.
- When **planning career paths**, a clear process should be in place which includes the following:
 1. Clearly identify the skills and competencies required.
 2. Determine the percentage of competency required by the new appointment initially.
 3. Identify potential talent. The following methods can be used:
 - Formal
 - Academy
 - Succession planning
 - Career discussion
 - Informal

- Performance development planning
- Through line manager
- Feedback from organisation

Developing Staff for Leadership Roles

- Implement a generic development programme.
- Provide opportunities to **experience and practice** the role before formal appointment, and provide a support network to assist at this stage. Secondment can be one means of providing this valuable experience.
- Provide **feedback** relating to the actual experience in a structured way which allows for 2-way communication.
- A formal **assessment** process should be in place for potential appointees, which includes all or some of the following (testing whatever aspects you deem to be most important):
 - A competency based interview
 - Group discussion
 - Formal presentation
 - Role playing
 - 1-2-1 coaching
 - Teamwork exercise
 - Situational questions
 - Psychometric analysis
- Provide feedback on the **results** and feed into the on-going development process.

Development Programme Topics

Development programmes may cover some of the following topics:

- What management involves
- Tasks and responsibilities
- Prioritising
- Coaching for performance
- Planning
- Sales/Service management
- Understanding and applying management information
- Corporate culture, strategy, vision, business plan
- Contact centre technology
- People skills, e.g. influencing, leadership
- Awareness of other parts of the organisation and how they interact with the contact centre
- Time spent in other areas
- Customer service concepts
- Self development
- Team building

Development Timescales

- To become **fully experienced** in this role requires twelve to eighteen months depending on the individual.
- However, it would be expected that the **minimum performance level** would be attained in six to nine months.
- **Generic training** should be completed within twelve months.
- **Milestones** should be used to determine performance levels, e.g.
 1. Basic
 2. Fully competent
 3. Expert

These milestones should be set within the development programme.

- Between 15 and 25 **days of training** would be required to complete the training programme.
- **Training methods** can vary and may include the following:
 1. Classroom projects
 2. Shadowing
 3. Web-based
- **Line management** **MUST** be involved and committed to the process. This should be considered when designing a training programme, and sold to management, in order to avoid conflict in terms of time expectations and operational activity.

Making External Appointments

When making external appointments to management roles, the following should be considered:

- Cultural fit is very important. Therefore it can be helpful to provide a **site visit** for the prospective candidate, in order that they can spend time in the centre and appreciate what is required. Ensure that the visit is structured and provides an opportunity for a questions and answer session.
- **Shadowing** a Team Leader can also be useful.
- Use an **assessment centre**, in order that skills and knowledge can be tested thoroughly.
- A **probationary period**, usually six months extendable, is the norm. Performance should be reviewed on a monthly basis and feedback given. In this way any issues can be addressed in a timely manner and action taken prior to the end of the probationary period.

Further Information

For further information on this topic, or for more details regarding the CCA Standard[®] User Groups, please contact Judy Smyth, CCA Best Practice Specialist, at judy.smyth@cca.org.uk