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# Building and Implementing a Career and Skills Framework Workshop

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1. Introductions
2. Understand broad reasons for attending this workshop
3. Expectations from today's workshop

So why implement a competency based career framework?

### Breakout

Task 1 – define benefits of using a framework

Task 2 – what problems do you think it will address



## e-skills UK and the Framework



e-skills UK, in partnership with Accenture, has brought together employers, industry experts and professional bodies to develop a **Contact Centre Career and Skills Framework**.

The Framework has been **approved by 50 employers and stakeholders** via a series of one-to-one interviews and regional workshops. Key sponsors of the Framework include T-Mobile, Manpower, Microsoft, the Sitel Corporation and The Listening Company.

## Employer Participation and Validation

**The many employers and stakeholders who have contributed time, effort and opinions to the development of the Career and Skills Framework include:**

BBC	Lastminute.com	Sky Subscriber Service Ltd
British Car Parks	Littlewoods	Sitel Corporation
BT	Lloyds TSB	The Saleshouse
Capita Business Services	Manpower	Teletch UK
Calcom	Microsoft	THUS
Call Centre Association	Morgan Stanley	The Listening Company
Call Centre Managers Association	National Westminster Bank	TXU
Chartered Institute of Personal Development	NHS Direct	Ventura
Crawley Borough Council	Northern Rock	Vertex
Customs and Excise	On-line Finance	Yorkshire Building Society
Inland Revenue	Royal Bank of Scotland	Zurich
Intelligent Finance	Scottish Power	118 UK

## Why the Framework is Needed

**“To compete in the global contact centre marketplace, UK employers are increasingly focused on excellent customer service as a means of competitive differentiation. This requires a highly skilled, professional workforce”.**

*A Strategic Plan for Contact Centre skills in the UK, 2002-2005*

**Attrition** is costing the industry an estimated £1.1 billion a year. Attrition is linked to poor recognition and rewards, limited career progression and poor development opportunities.



**The Framework will promote an industry-recognised framework of possible career routes.**

**Recruitment:** Negative stereotyping of contact centre jobs is a major inhibitor to attracting the required new entrants, as are misconceptions about job content and the skills required.



**The Framework is the first step in increasing the level of recognition of the complexity, challenges and skill needs of the contact centre environment.**

**Learning and Development:** Lack of recognised development pathways linked to career progression is a major inhibitor in terms of both skill development and retention.



**The Framework will provide a frame of reference for employers and individuals to identify the skills needed at each career level, hence select the relevant training programme.**

## The Career and Skills Framework

**The Career and Skills Framework identifies a comprehensive set of contact centre competencies linked to roles and career routes a contact centre professional may pursue.**

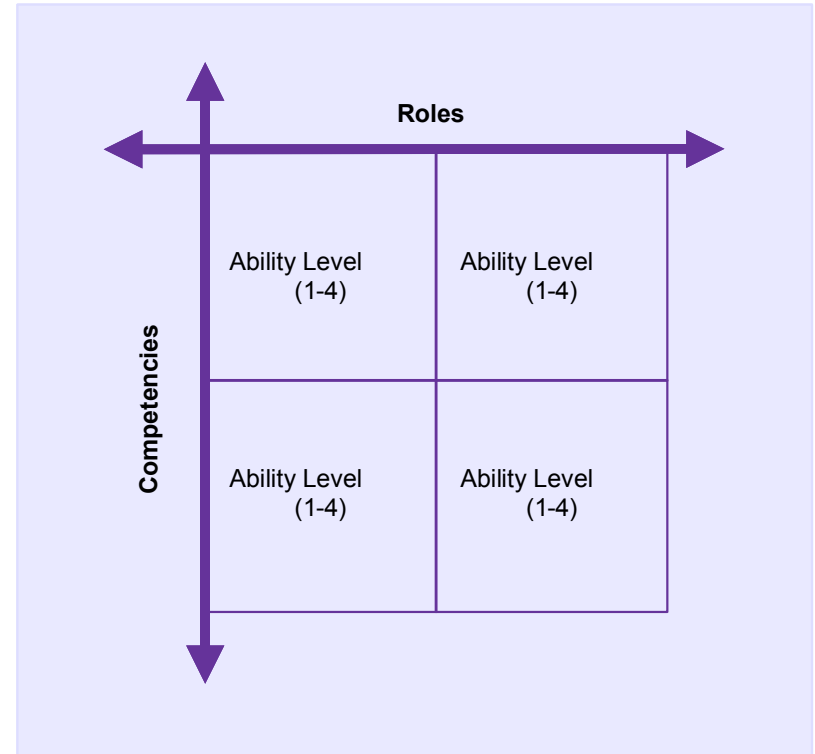
### **The Framework :**

- Highlights the competencies required to deliver exceptional customer service, acquire and retain customers and manage effective contact centre operations
- Offers practical support to contact centre clients in developing the multi-skilled, technology literate contact centre professional of the future
- Helps clients build a talented and professional contact centre workforce able to add value to each customer interaction across multiple channels and products

## How the Framework Works

### 3 core concepts:

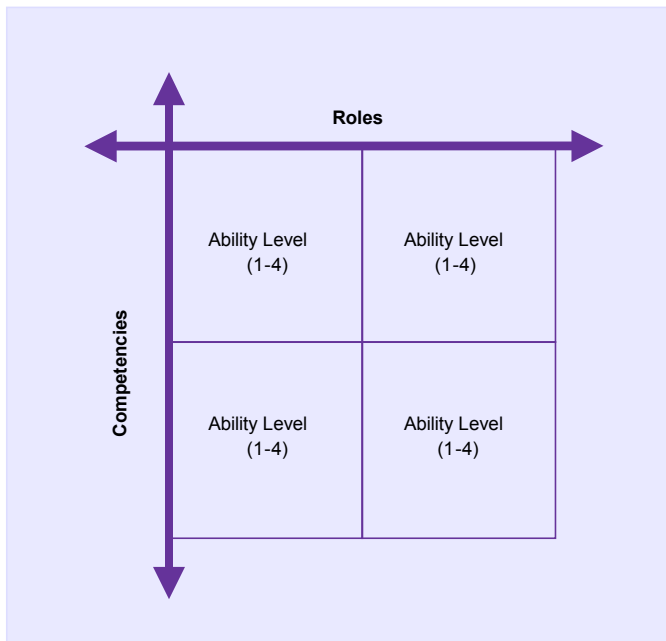
- Competencies
- Roles
- Levels of Ability



*A competency comprises the knowledge, skills and behaviours necessary for the effective execution of business activities*

## How the Framework Works

The Framework identifies the front line competencies within a simple to use model based on three core concepts.



### Competencies

- The generic, non-industry specific competencies required to perform successfully as a contact centre professional across all career levels and roles
- Six competency categories have been defined: Customer service provision, Customer acquisition, Operations management, Technology skills, Business skills and Personal aptitudes.

### Roles

- Eleven generic roles have been identified which are applicable across the contact centre sector, ranging from Advisor through to Contact Centre Manager

### Levels of Ability

- For each competency four unique levels of ability have been defined based on a set of guidelines.
- For each role the Framework will define an expected ability level depending on the competency. For example, a Customer Service Advisor may demonstrate ability level two for telephony skills.

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# Competencies

## Customer service provision

The competencies required to provide outstanding customer service

## Customer acquisition

The competencies required to sell products and services and acquire new customers

## Operations management

The competencies required to manage the day-to-day running of a contact centre

## Technology skills

The skills required to operate contact centre technology, systems and tools

## Business skills

The professional and interpersonal skills required to develop successfully as a contact centre professional

## Personal aptitudes

The essential behaviours and characteristics required across all career levels

## Levels of Ability

### Example Customer Service Ethos

#### Learning (1)

##### **Understands customer needs**

- Interacts with customer in a helpful and sensitive manner
- Focuses on addressing customer query

#### Performing (2)

##### **Takes ownership of customer enquiries and problems**

- Builds a trusting relationship with the client
- Identifies issues that could affect the efficiency of service delivery
- Ensures response time and resolution time objectives are met

#### Enhancing (3)

##### **Adopts customer perspective in all interactions**

- Solicits informal feedback to improve quality of service
- Follows up with customers, where appropriate, to ensure efficiency of product/service recommendations

#### Leading (4)

##### **Balances customer needs and contact centre requirements**

- Fosters an environment of customer service
- Builds long term perspective in developing customer relations

# Business Skills within the Framework

The table below is an extract from the Framework

Competency	New Entrant (pre-training)	Customer Service Advisor	Sales Advisor	Experienced Customer Service Advisor	Experienced Sales Advisor	Product Specialist
1.1 Customer service ethos	1	2	2	3	3	3
1.2 Measuring customer satisfaction		1	1	2	1	2
1.3 Complaints and issues management		2	2	3	3	4
2.1 Product advice / support		2	2	3	3	4
2.2 Service advice / support		2	1	3	2	3
2.3 Transaction processing		2	2	3	3	3
1.1 Customer segmentation		1	1	2	2	3
1.2 Campaign management		1	2	1	2	2
2.1 Sales planning and opportunity management			1		2	3
2.2 Outbound sales			2		3	3
2.3 Inbound sales (cross / up selling)		2	2	3	3	3
2.4 Sales tracking and reporting					1	
1.1 Forecasting						
1.2 Scheduling*						
2.1 Recruiting*						
2.2 Team building		1	1	2	2	2
2.3 Feedback and coaching		1	1	2	2	2
2.4 Call / Contact monitoring and reporting*		1	1	1	1	1
2.5 Performance appraisal		2	2	2	2	2
2.6 Employee retention		1	1	2	2	2
3.1 Quality assurance		2	2	2	2	2

<b>Key</b>	1	<b>Learning</b>	Recognises individual responsibilities and performs basic tasks
	2	<b>Performing</b>	Performs a variety of actions with minimal supervision and contributes ideas and knowledge
	3	<b>Enhancing</b>	Handles complex tasks, evaluates performance and provides recommendations for improvements
	4	<b>Leading</b>	Sets direction, optimises performance and acts as a role model
Detailed explanations of the level of ability for each competency is available within Part 3 'Levels of Ability Explained'			

## Applying the Framework

**The Framework is a flexible model and can be adapted according to business need, either complementing an existing competency model or being used as a baseline to develop a new competency model.**

Employers are likely to use the Framework in several ways, for example:

- To **measure the competencies employees have against those required**, and thus identify competency gaps
- To develop **training programmes** mapped to national and government sponsored learning and development pathways
- To identify a range of **career development pathways** within their contact centres
- To provide a set of competency-based **job profiles** to support effective recruitment and selection
- To support competency-based **performance management and appraisal** processes

## What's in – what's out

### The Framework **includes**:

- Individual aptitudes and behaviours required to **deliver excellent customer service and to generate sales revenues**
- Competencies required to **sell and provide services through direct customer interaction across multiple channels**
- Competencies required to **direct, manage and measure those business activities unique to a contact centre environment**, which support the generation of revenue and the provision of excellent customer service

### The Framework **excludes**:

- The competencies **unique to a particular industry segment**
- The business activities and related competencies associated with **'off-line' (or back-office) activities**
- **Business management and operations activities common to all organisations**, with no specific requirements unique and/or critical to a contact centre environment

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## Links to Education

- Competency definitions mapped to skill definitions for NOS
- Levels of ability correspond to NOS statements of competence
- Roles map to NOS level



## Quotes from employees before implementation

- The performance appraisal system puts you in the mind of the school report
- You get a deputies job if you are pally with your manager
- If I am not in trouble, I must be doing OK
- You've gotta be motivated and focussed but you are not shown how
- We need on-going training. Once you have been on the phones, you have a better idea of what it is like
- Appraisals are about praise – any negatives have already been handled in one to ones
- I would like to build a career here but there are no opportunities to broaden my skills and progress which I find very de-motivating
- We need career progression and training – any initiative is generally knocked out of people
- I am an expert on the team but I have been here less than six months
- I want to be treated as a customer service advisor not a call centre idiot
- Pay me on what I can do not my job title

## The Challenges

- **800 seats**
- **70% turnover level**
- **Exceeding recruitment budget**
- **Reactive training programme focussed on induction training**
- **Cumbersome, onerous appraisal process**
- **Contact centre staff and rest of business staff divide exacerbated by appraisal process**
- **No competency framework**
- **99 different job descriptions and titles**

## WiiFM – The Business

### Measurable ROI

#### Reduced recruitment costs

- Attrition reduced
- More internal promotions
- Attractive employer – more applications from recruitment pool

#### Sponsored learning and development

- Government funded learning programmes NVQ's, MA's
- Opportunities for internal accreditation of learning programmes
- Ability to monitor, track and forecast skills shortages

#### Improved sales and service to customers

- Better trained staff
- Better representation of brand
- Competitive edge

## WiiFM – The Staff

- **Skills identification, tracking and gap analysis at an individual level**
- **Better understanding of expectations within role**
- **Focussed learning and development**
- **Clearly defined career progression (development objectives)**
- **Transferability of skills and nationally recognised qualifications**
- **Instilling a sense of value, pride and job satisfaction**
- **Equality of opportunity linked to fair assessment of performance**

## Achievements

- **Reduced recruitment costs by £125k over 12 month period**
- **Reduced attrition by 20%**
- **Savings reinvested into training and development**
- **Appraisal system and process re-designed (principles employed by rest of business)**

## Task:

1. Define Business/Cultural Objectives ('what')
2. Link these to the framework ('how')

## Example: 1<sup>st</sup> call resolution

### Objective:

- Increase % of calls handled with first contact resolution (reduce call load, improve customer and agent experience, improve efficiency, reduce costs)

### How will we achieve this using the framework?

- Increase appropriate skill sets of agents
- Identify those competencies important in achieving 1<sup>st</sup> contact resolution
- Identify specific training needs / format at individual and group level
- Align training and learning to needs of business
- Incentives / reward based around measurement of key KPIs / competencies
- Improved and focussed performance management processes
- MI aligned to competency based processes

## Method and Approach

- Many different ways to implement the framework in terms of mechanics
- Framework embedded in culture, business planning and processes
- Needs to reflect where we want to be not where currently at

**I.e. THIS SHOULD NOT BE AN AN ALIGNMENT PROCESS**

## **Method and Approach**

### **2 Phase approach**

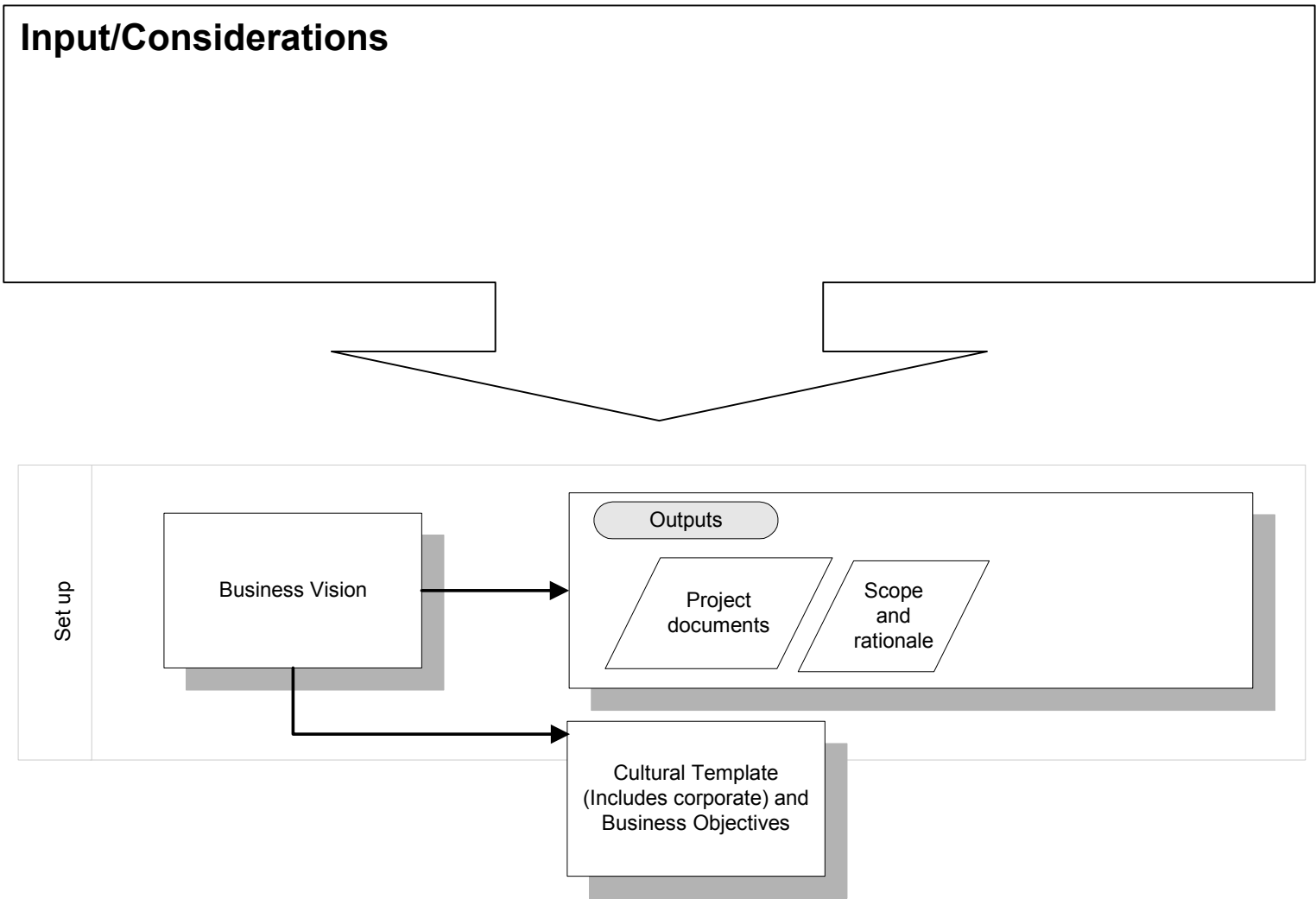
#### **Phase 1: Development**

- 1. Set up & Business Planning ~ Scope Definition**
- 2. Development of tools (bespoke)**
- 3. Development (or modification) of supporting business processes (embedded processes)**
- 4. Test tools and processes across model teams**

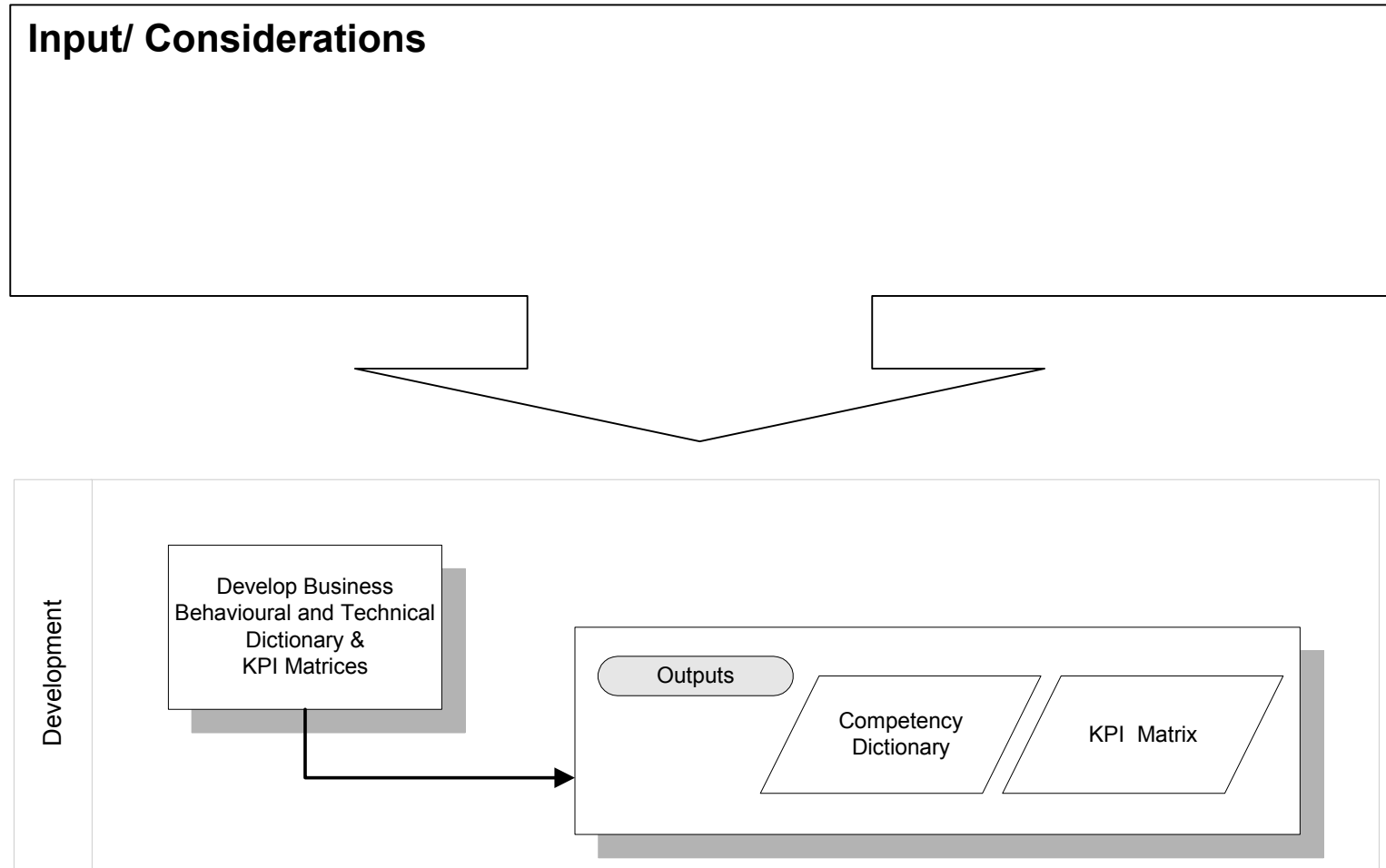
#### **Phase 2: Project Management**

- 1. Phased Roll-out**
- 2. Monitor, review and refine**

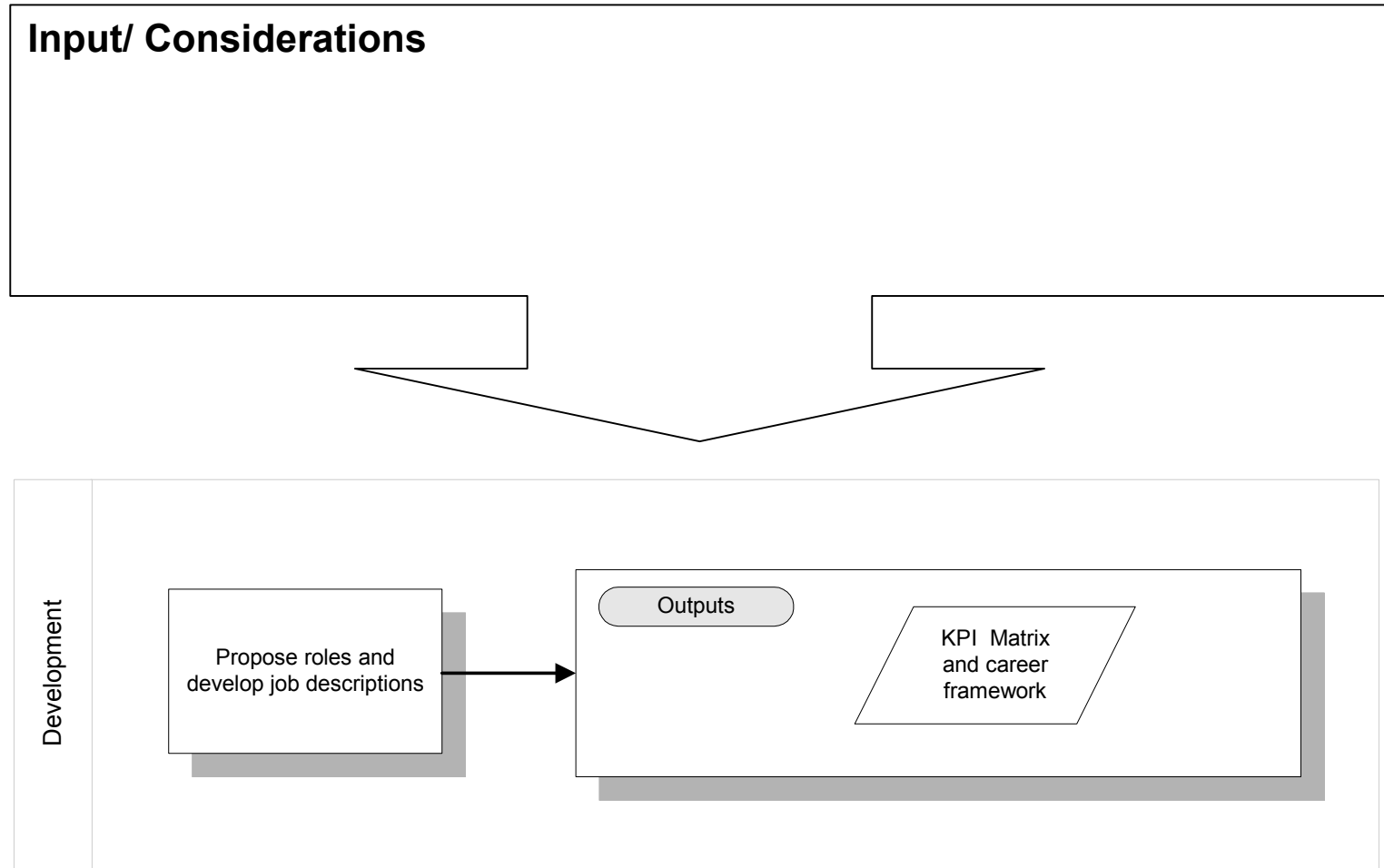
# Method and Approach: Set up



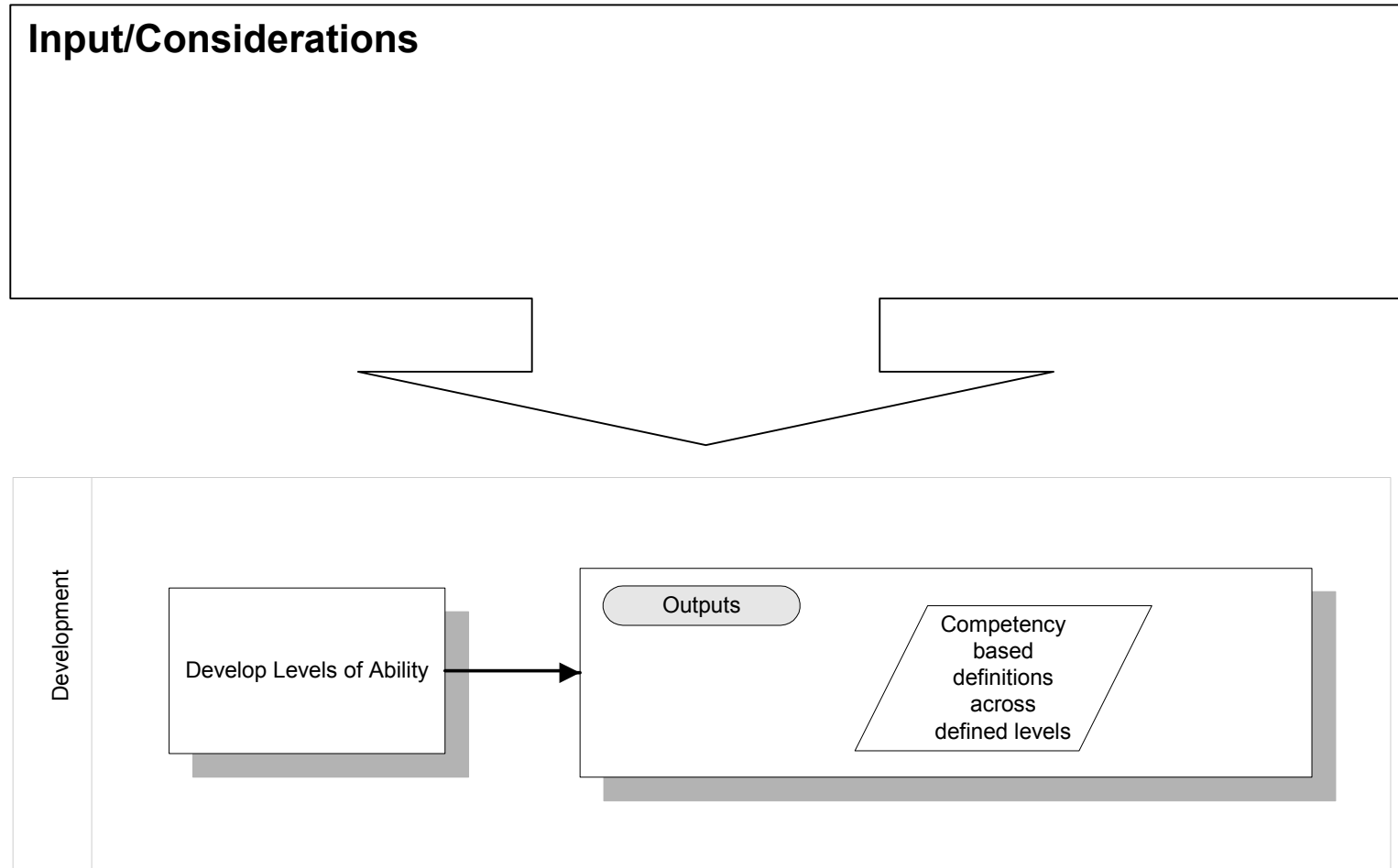
## Method and Approach: Development #1



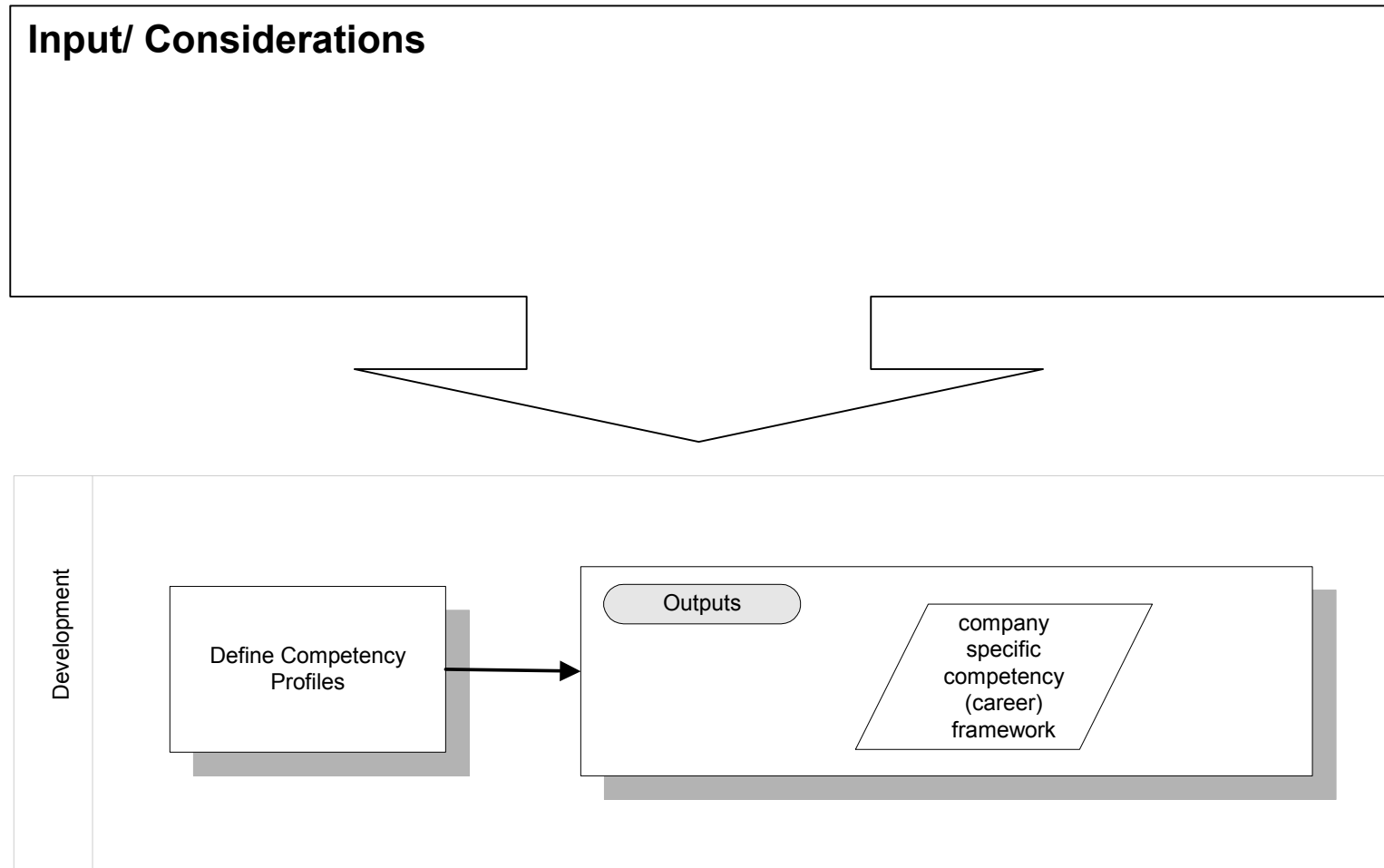
## Method and Approach: Development #2



## Method and Approach: Development #3

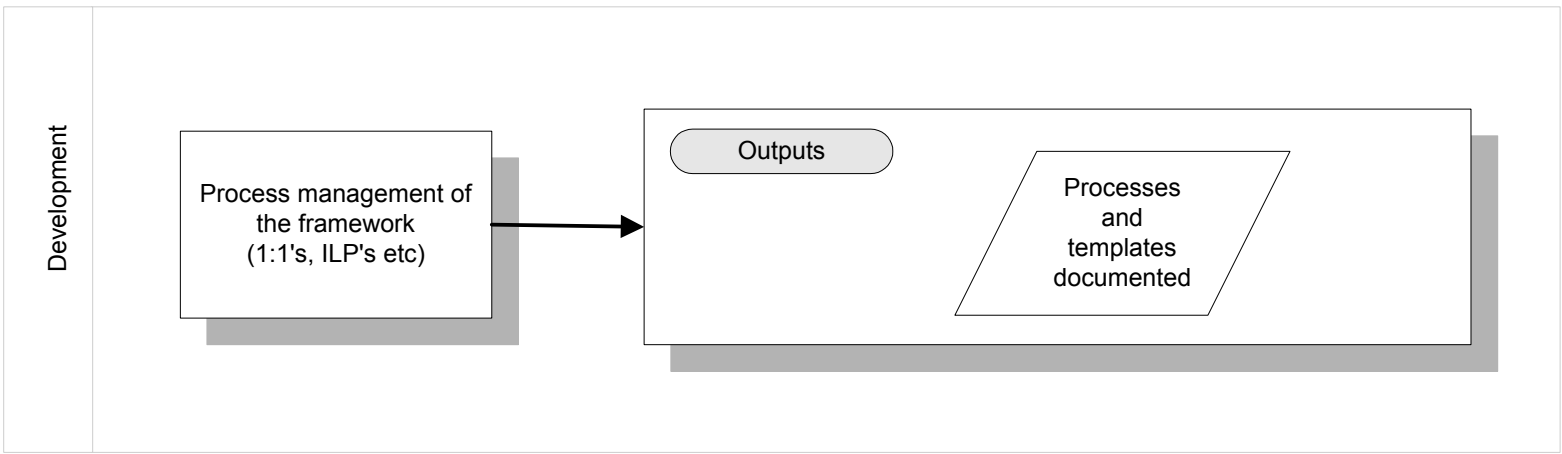
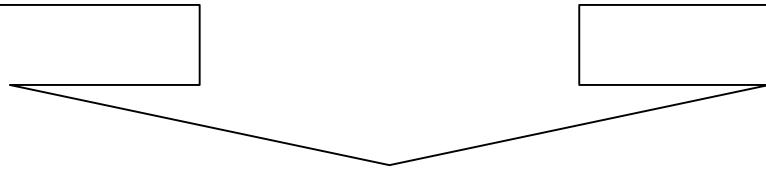


## Method and Approach: Development #4

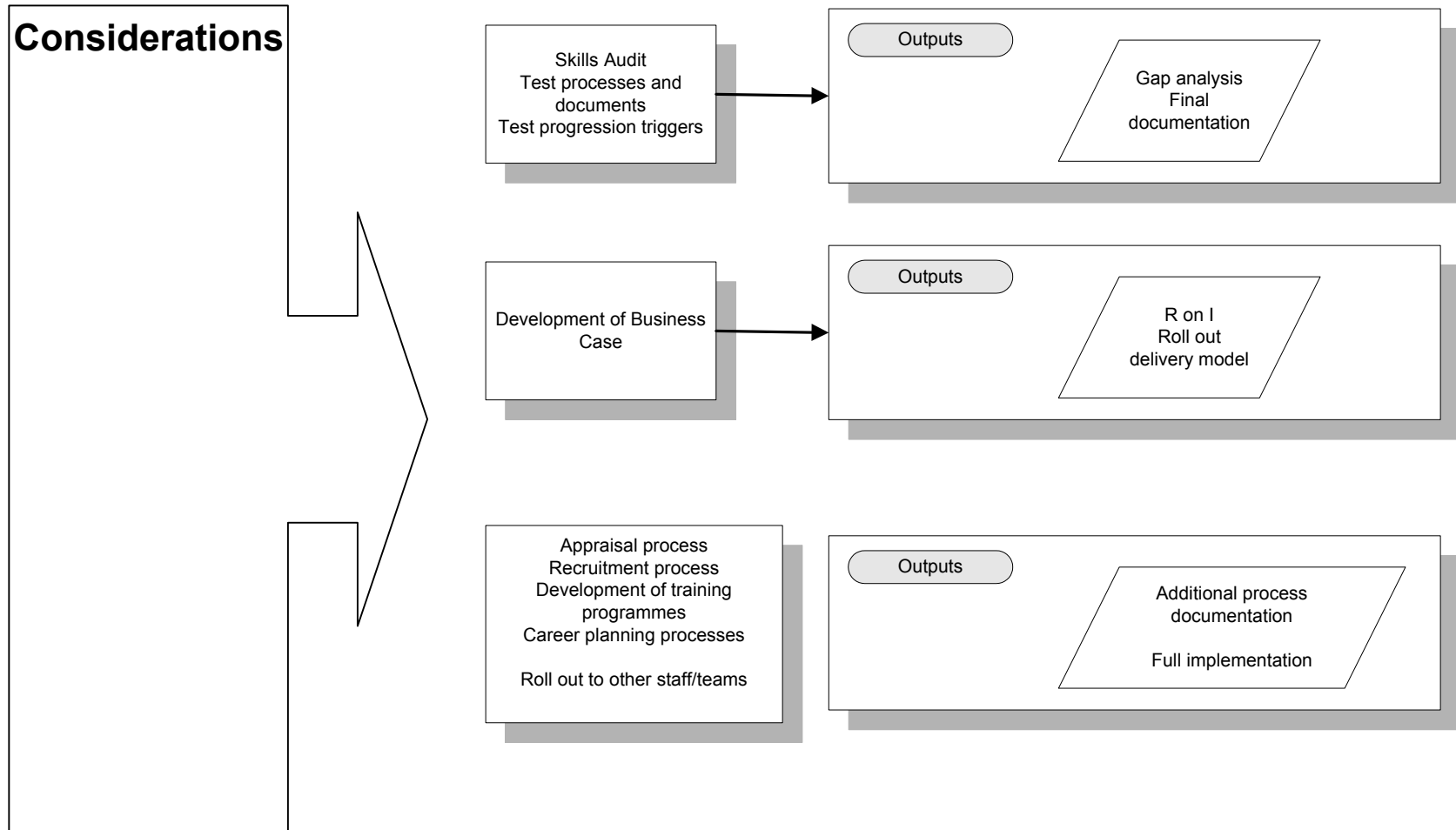


# Method and Approach: Development #5

**Input/considerations**



## Method and Approach: Test & Pilot



- Aids retention through development opportunities within the flat structure
- Manages expectations for progression and is transparent (promotion process)
- Improved morale and culture linked to formal career planning process (integrated to training, pay)
- Economy of scale through horizontal development
- Aids sustainable and manageable succession planning
- Encourages employees to develop selves and engage in training linked to career progression

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## How a competency framework provides career planning

1. Progression to fully effective e.g. prerequisites or pre-fully effective advisor roles.
2. Development within role to become fully effective
3. Development to another role – pre-req or another func
4. Differentiation between internal vs. external role
5. High levels – more ability. Being clear about abilities and behaviours vs. technical competency
6. Management Information
7. Example spreadsheets to illustrate

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# Questions and answers



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**Thank you**



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