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**FEATURE**

**Making the Grade**

*E-learning deployments earn straight A's when used in conjunction with formal classroom training.*

by [Coreen Bailor](#)  
From CRM Magazine [January 2007](#)

It may be hard to believe at this stage of CRM's development, but most organizations still receive poor grades when it comes to providing comprehensive--even adequate--training for service and support professionals. Want proof? According to a report by the Service & Support Professionals Association (SSPA), just 27 percent of service and support staff spend more than five days on annual ongoing training. An even more startling finding in SSPA's "Top Talent for Service and Support Industry Study" is that 82 percent of new hires feel they do not receive much training in customer service skills, compared to only 18 percent who feel they do.

A growing number of progressive organizations are, however, turning their attention to the burgeoning e-learning market, which is a subsegment of corporate e-learning. E-learning tools help boost agent performance by delivering training components that can be as basic as simple content or more complex like intricate tests and simulations. More specifically, e-learning can deliver tailored training to agents based on skill gaps determined by assessing recorded interactions.

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Another primary attraction of e-learning is its time-conscious model. "Delivering e-learning directly to the reps' desktop saves time and money, as it can be scheduled to send out when call



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volumes are low, so no time off the floor for reps needs to be scheduled," says Connie Smith, chief evangelist at Envision Telephony.

Some companies are even using e-learning for employees outside of the contact center in areas such as in physical stores, and to distribute important company information like changes to 401ks. Knowlagent, OutStart, and SumTotal Systems are vendors known for their contact center e-learning functionality, while Sivox Technologies specializes in e-learning simulations. Most QM players, including Envision, etalk, NICE Systems, Verint Systems, and Witness Systems, also offer e-learning tools.

The market is still relatively small. Jim Davies, a principal analyst at Gartner, says, "The e-learning market accounts for less than 5 percent of investment in contact center applications. However, as organizations seek to enhance the customer experience, improve customer satisfaction, and increase revenue generation, [e-learning] is being viewed as a key enabler and we expect significant growth in this undervalued market through 2007."

#### Real-World Experience

Many contact centers struggle to find a balance between providing training without pulling agents away from the phones for too long and providing training nuggets in real time so that training clips can have maximal effect. E-learning is able to push training pieces targeting agents' performance weak spots straight to their desktops. E-learning can be created on the fly and sent to agents during a call for immediate boosts, or archived in a library for ongoing performance improvement.

Creating clips on the fly lets managers and supervisors take bits of actual calls, complemented by additional elements like agents' screen data and added supervisor comments, and deliver the chopped recordings to agents moments after the actual interaction. This form of e-learning brings a degree of realism to agent training. The concept of creating training clips on the fly, according to Paul Stockford, chief analyst at SaddleTree Research, was pioneered by Envision with its Click2Coach product. Describing the type of education agents received, Stockford says, "It's kind of like what you learned in college versus what you have to do when you get out in the work world. It's a huge difference."

Perhaps equally as important to timely delivery is the length of the clip. Setting aside sufficient time in agent schedules for adequate training is difficult, as companies fear that too much time away from the phone will result in not enough available agents. More contact centers are opting for simpler, smaller nuggets of learning on an ongoing basis.

A smaller clip size also means a smaller amount of needed bandwidth, making it easier to push content via the Web, which is especially important for contact centers with geographically dispersed agents. There is real value in "learning automatically based on skill gaps and then being able to know what the agents have taken and comprehended," says Bill Byron-Concevcitch, chief learning officer at Witness.

#### Collaborate and Catalog

Some contact centers are taking a more collaborative approach to generating e-learning materials by culling information from disparate sources like marketing and human resources. That's where sharable content object reference model (SCORM) compliance comes in. SCORM is a collection of standards and specifications adapted from multiple sources to provide e-learning capabilities that enable interoperability, accessibility, and reusability of Web-based learning. "Things like SCORM compliance are hitting the call center now because [centers are] starting to realize that a lot of this content may exist already somewhere within the company," says Matt Storm, product manager for etalk's e-learning product line.

Creating searchable content, whether solely through the contact center or through a combination of company resources, and then cataloging clips into an e-learning library lets agents and managers reuse content for ongoing learning postevent and during a call. "If adults learned everything the first time and they remembered forever then we'd be great, but they don't and that's why [we] see people using e-learning systems as a knowledge base," Storm says.

#### Bring the Pieces Together

E-learning is becoming an integral component of the broader workforce optimization (WFO)

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landscape (comprising QM, performance management [PM], e-learning, and workforce management), rather than a mere standalone element. Here's how WFO can work: If an agent scores X or lower on a recorded transaction based on defined KPIs within the PM system, an e-learning session can be sent to the agent to close the performance gap. Firms can take that a step farther by having a workforce management system schedule the times the agent fields calls and takes e-learning sessions, ensuring that training will not interfere with the agent meeting his responsibilities. The results of the training component can then be sent back to the agent and/or supervisor and tacked on to the agent's employee record.

Coca-Cola Enterprises (CCE) realized e-learning's promise when the world's largest marketer, producer, and distributor of Coca-Cola products created a high-performance call center from the ground up. CCE has all four pieces of WFO, using Blue Pumpkin (now Witness) for workforce management, NICE QM, Knowlagent for e-learning, and a mix of systems for performance management (including scorecards from NICE, and Knowlagent for e-learning).

CCE conducted most of its telephone sales in a decentralized way. The company also employed between 120 and 150 service reps scattered across the United States who dealt strictly with equipment service issues. The service reps "really weren't trained to handle anything else," says Nita Pennardt, vice president of customer development at CCE. If a customer called who needed to place an order she would have to be redirected to someone capable of handling the transaction, according to Pennardt. This decentralized structure also generated an inconsistent curriculum across its dispersed locations.

To assemble a high-caliber center CCE purchased and refurbished a building in Tampa, consolidated activity from its 20 U.S. divisions, and implemented various technologies including Knowlagent's e-learning functionality. "Today all of our reps, whether they be sales reps or service reps, are totally cross trained to handle any type of transaction and our service reps are well trained to sell," Pennardt says. In fact, in many instances when the company launches a product, its service reps generate up to 40 percent of its new penetrations. Going forward CCE plans to use Knowlagent's r8 for much of its performance management. Features of r8 include a role-based console for the agent and supervisor that provides dashboards to monitor activity, actions to improve agent performance, and sensing technology to track and report on agent behaviors in real time.

CCE's integrated apps allow agents to receive targeted training at the most appropriate times. "It helps us keep the right number of people on the phones at the right time throughout the course of the day, but make sure they all have the opportunity to get the information they need," Pennardt says.

### DIY

As companies offer more complex offerings, training becomes even more important. Learning from best and worst practice customer interactions can enhance performance. A financial services company took this strategy by implementing Witness's then eQuality Producer, now Impact 360 Contact Editing, taking recorded calls and turning them into learning material. The challenge, however, was how to present worst practice examples without including the voice of the agents who fielded the calls. A few of the center's supervisors--who also happened to be amateur actors--did voiceovers of the real agents and customers, adding a humorous element. "If we can embed humor into learning then the impact can be even greater than just kind of a straightforward serious learning scenario," Byron-Concevitich says.

Some companies are taking training previously specified for contact center agents and delivering it to other customer-facing employees. Storm describes an example of one of etalk's customers (a mobile phone provider) that has dabbled with providing employees at locations like physical stores or mall booths with the same training content as its contact center agents. "If I'm an agent who takes service calls or I'm an agent who works at a kiosk at a mall, I still may need to be trained on the same thing," Storm says. "That's where SCORM comes all the way back around again."

Other organizations are realizing that e-learning is no longer just for training employees, and that it can serve as an effective mechanism for distributing information. For example, if there is a new 401K plan for employees for the upcoming year, an e-learning clip can be created and sent to all employees to advise them of the changes, according to Envision's Smith. "There is no longer a need to take all employees off the phones in groups to relay this important information." Another Envision customer is using e-learning clips and placing them on the

company Web site to educate its customers on medical policies and procedures. "This not only gives the customers the ability to gain this information quickly, but saves the contact center from unnecessary calls," Smith says.

Simulations, which are most often used in contact center environments to replicate real calls and allow agents to role play, are also used outside of the training realm. Some newer simulation applications are upping their authenticity appeal by incorporating speech recognition. Agents go through a mock-up call, complete with the ability to respond as they would during a real call, and receive critiques and coaching from the system.

CCE started to build its simulations using Knowlagent's functionality so that agents get practice handling customer inquiries. "They can be coached on the way to handle it before they're actually called upon to do it. It helps build their confidence," Pennardt says. Saddletree's Stockford anticipates more simulation implementations used for training purposes, but also forecasts more use of simulations as part of contact centers' hiring and recruiting methods. CCE, for example, plans to create realistic job previews and simulations using Knowlagent to incorporate into the recruiting process.

### **E-Learning Expectations**

Some industry pundits expect to see a declining interest in computer-based training (CBT) systems as e-learning advances. Traditional CBT hasn't worked well for contact centers because they are generally 45-minute to 2-hour courses and centers do not have that kind of time to take their reps off the phone to be trained, Smith says. "The other problem with CBT is that it is very generic, sort of a one-size-fits-all, which is impractical and inefficient. The only thing I still see CBT used for in the contact center today is for new hire training or for companies that offer a remote workforce as a way to train."

Expect to see more merging of corporate knowledge with e-learning in the contact center, Gartner's Davies says. With this, "agents not only have access to training to make them perform better, but they also have access to more pan-enterprise information so they can get a better understanding of the business as a whole." One company that is doing this is OutStart, which provides learning, knowledge sharing, and community and expert collaboration solutions.

Another area that is forecasted to see more interest is impacting agent performance during real interactions. This should lead to heightened interest in workforce optimization, especially more deployments that link performance management with e-learning.

However, e-learning is not a replacement for all customer service training. Contact centers will maximize their training efforts by taking a blended approach of combining automated training with brick-and-mortar-style classroom training. CCE still uses some formal classroom training, but "it's really what takes place after that that's so important," Pennardt says. "It's the ongoing opportunity to not only train our reps, but...to keep them informed on the latest happenings or things they need to know about changes in the business."

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### **E-Learning Excellence: 4 Points to Practice**

**Make Content a Priority** One of the biggest mistakes that contact centers make when trying to develop an effective automated training initiative is not focusing enough on content. "In many cases they may not have invested either the time or the money or both," says James Lundy, a Gartner vice president. Also, incorporate elements to make your curriculum interesting, incentive based, and collaborative. Lundy likens the importance of sound content and infrastructure to television. You may have the TV set, he says, but "you still need to have the TV shows that are interesting."

**Take a Test Drive** Conduct pilot sessions to determine what pieces of your e-learning program are a success and what needs more work, and then expand from there.

**Don't Bite Off Too Much** E-learning does not have to consist of lengthy pieces of training chunks, so experiment with very short segments of training. "Take one concept and build a module on that with a quiz with a couple of questions on the end and begin to build libraries with lots of those in them," says Bill Byron-Concevitich, chief learning officer at Witness. You'll help agents tap into the information they need quicker.

*Mash It Up* Rather than relying solely on one type of training delivery model, combine automated learning with classroom training. --C.B.

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