2016 Ops/Business Management Seminars

10 Course Core Curriculum
Introduction to Workforce Management: Understanding Staffing and Scheduling Learn about staff planning and identify the supervisor's and agent's role in the process
Key Performance Indicators: Managing by the Numbers Learn about the top performance measures and how to report them effectively
Making the Match: Recruiting and Hiring Call Center Staff Define the job, recruit, screen, and hire the best people for the job
Introduction to Call Center Technology: A Beginner's Guide Define technologies used to improve service and maximize efficiency of the center
Telecommuting That Works: Strategies for Utilizing Remote Agents Implement remote staffing strategies including essential operational checkpoints
A Winning Vision: Essentials of Strategic Planning for Call Center Leaders Develop a strategic plan and tactics to accomplish center mission and goals
Dollars and Sense: Basics of Finance for Today's Call Center Professional Interpret financial statements and calculate return on investment and payback period
Making the Case: Business Case Development and Project Management Apply the fourteen steps of developing business cases and managing projects
Business Process Improvement: Six Sigma and Beyond Define Six Sigma and other business improvement processes and their place in call centers
Analytics and Reporting: Developing a Contact Center Reporting Plan Develop a reporting strategy aligned with enterprise mission and goals

2016 Operations/Business Management – Core Curriculum

NOTE:
Introduction to Workforce Management and **Key Performance Indicators** courses are also part of the Call Center Supervision curriculum and certification process.

Introduction to WFM: Call Center Staffing and Scheduling

Workforce management is the process of getting the "just right" number of staff in place every hour to maximize service and minimize cost. In this session, you'll learn the implications of getting the numbers wrong, as well as the step-by-step process of effectively forecasting calls, calculating staff requirements, creating staff schedules, and tracking daily service and performance. You'll hear about the critical tradeoffs between staffing, service, and cost and how each of these tradeoffs affects the final staff count. Attendees will also learn the impact that each and every person can make in terms of achieving service goals for the day.

Students will learn to:

- Define workforce management and its implications on cost and service.
- Describe why call center staffing is such a unique kind of problem.
- Outline the step-by-step process of forecasting calls, calculating staff, and creating workforce schedules.
- Identify the impact that every single individual has on meeting service goals and balancing workload.
- Outline ways to improve attendance and schedule adherence.

Key Performance Indicators: Managing a Call Center by the Numbers

There are many truths told in the vast array of statistics available today in the call center – and the successful manager or supervisor will be the one that understands how to manage by the numbers and not be overwhelmed by them. This session provides a useful set of formulas and calculations for understanding the math associated with today's most common key performance indicators (KPIs). Attendees will learn about the most common measures of performance and how to calculate and analyze them. The session will present the "top ten" KPIs and de-mystify the math behind the numbers.

Students will learn to:

- Identify the most critical KPIs for call center and agent performance and how to calculate them.
- Calculate the service, cost, and productivity implications of staffing decisions.
- Define the critical KPIs to reflect quality of service as well as service efficiency.
- Identify the most common math mistakes made in call centers today.
- Describe how to perform a correlation analysis to ensure the correct KPIs are in place to support business goals

Making the Match: Recruiting, Screening, and Hiring the Call Center Workforce

Ever wish you had a crystal ball and could predict how those candidates you're interviewing would really perform on the job and how long they'd stay with you? We're not passing out crystal balls in this session, but we can promise some tips and guidelines for creating a more effective hiring process. You'll hear proven strategies for creating an effective recruiting pool and then learn how to "skim the cream" to select the individuals who will be both effective on the job as well as happy on the phones for long-term retention. This session will also provide an overview of the latest screening and assessment tools and legal guidelines to follow in the interview process.

Students will learn to:

- Perform a job task analysis to define candidate requirements.
- Identify traditional and creative ways to attract a large, qualified base of recruits.
- Design an effective set of interview questions.
- Identify the hidden factors that lead to initial staff turnover.
- Describe ways to paint a realistic picture of the call center environment and daily work.

Introduction to Call Center Technologies: A Beginner's Guide to Understanding the Call Center Technologies

This session will provide an overview of the many technologies used in the incoming call center to improve customer service and maximize efficiency of the center. Three categories of technologies will be presented. First, the various call routing and delivery mechanisms for getting the call to the agent desktop will be presented. The second part of the workshop will focus on related call center technologies that benefit the organization as the center grows in size and complexity to manage performance. Finally, the third category of technology presented will be the wide array of CRM technologies to support the customer experience. The session will also include tips on procuring and implementing these technologies in the call center.

Seminar attendees will learn to:

- Define the three basic functions of technology: call delivery, performance management, and customer interaction.
- Identify what alternatives are available for routing calls and contacts to the agent's desktop.
- Describe the technologies that are available to help manage the performance of the center and the staff.
- Describe the latest in front-office and back-office CRM technologies.
- Identify some inexpensive technologies that could benefit your call center immediately.

Telecommuting That Works: Strategies for Utilizing Remote Agent Staffing

One of the toughest challenges facing call centers is always the ability to match up the available workforce to the peaks and valleys of call workload. Another challenge is retaining a call center workforce over the long-term. Many call centers today are finding that a remote staffing arrangement where some or all of the call center agents work from home is an effective solution to both these problems, in addition to reducing office space. In this seminar, you'll learn to build a business case for telecommuting workers, including a look at all the advantages and disadvantages of remote staffing, along with the cost implications. You'll get a checklist of the ten components in setting up a successful telecommuting program and hear five case studies of companies that have successful work-at-home solutions.

Students will learn to:

- Outline the advantages and disadvantages of remote staffing, from both a staff and company perspective.
- Identify the cost components of setting up this arrangement and calculate potential savings.
- Outline the operational components of implementing a remote solution.
- Identify what to do and not to do in setting up remote agents from companies who do it successfully.

A Winning Vision: Essentials of Strategic Planning for Call Center Leaders

One of the most critical roles of today's call center manager or director is that of strategic planner. Every call center should have a vision and a purpose that supports enterprise objectives and a plan for making it happen. In this session, you will learn about the elements and structure of a strategic plan. We'll provide guidelines to assist you in defining strategic initiatives such as customer access strategy, service goals, performance standards and measures, enabling technologies, staffing budget and plan, call center environment and culture, and center-wide professional development. The session will also review ways to define value and ROI of the call center operation and provide tips for communicating and gaining approval for the plan from senior management.

Students will learn to:

- Describe the benefits of developing a strategic plan for the call center.
- Outline the six key components and overall structure of a strategic plan.
- Define the steps of identifying key long-term objectives as well as the short-term steps of getting there.
- Identify how to link the call center plan to enterprise objectives and goals.
- Describe ways to communicate the plan and gain approval from senior management.

Dollars and Sense: Basics of Finance for Today's Call Center Professional

Planning and managing by the numbers is critical for any business and the call center is no different. Even though major financial decisions may be in the hands of the CFO, it's important for call center management to understand the numbers and be able to communicate with the finance department or executive team with confidence. In this session, you'll learn key financial terms and how they apply in call center situations, along with how to develop both a capital budget request and an operating budget. We'll discuss how to evaluate proposed investments in terms of ROI, payback period, and net present value calculations. Learn how to "talk the financial talk" and attend your next finance meeting armed with confidence.

Students will learn to:

- Define the terminology and calculations of primary financial measures.
- Identify the components of a capital investment request.
- Analyze lease versus purchase options for call center technology and services.
- Calculate and apply ROI, net present value, and payback period to aid financial decision-making.

Making the Case: Business Case Development and Project Management

Thinking about recommending a new technology or service for your call center? How do you ensure that the ACD upgrade or outsourcing service is really needed in the first place, and how do you go about convincing senior management to budget the dollars? This session provides an overview of the business case development process that will help you objectively review the pros and cons of the project, develop a thorough financial analysis of the situation, and reach a sound, defensible decision. You'll also learn the recommended steps of project management to ensure that your project is completed successfully and meets its objectives.

Students will learn to:

- Outline the reasons to create a business case and identify who should be involved in the process.
- List the twelve steps of a successful business case.
- Describe what a SWOT analysis is and how to use one in developing a business case.
- Identify the reasons most business cases fail and what can you do to prevent them.
- Outline the steps of project management that should be employed to ensure project success.

Business Process Improvement: Six Sigma and Beyond

Many different quality initiatives and business process improvement methodologies have come and gone over the years. This session presents one of the most popular and widely used process initiatives being used in the early 21st Century to improve customer satisfaction, improve operating efficiencies, and reduce errors in the workplace. Six Sigma has gained favor as a smart way to manage a business or department and a process that uses facts and data to drive business solutions that ensure return on investment and customer satisfaction. Whether your organization is planning a full-scale Six Sigma implementation or not, you'll benefit from learning the basic steps of this business improvement process and how it applies to a variety of call center issues.

Students will learn to:

- Define Six Sigma and other business improvement processes and their place in call centers today.
- Describe the process and tools that can be used to define business improvement projects.
- Identify ways to measure and analyze all types of customer and internal data.
- Describe alternatives for identifying potential solutions and doing a cost/benefit analysis of these options.
- Describe the process for implementing solutions and ensuring long-term success.

Analytics and Reporting: Developing a Contact Center Reporting Plan

The areas of performance optimization and performance analytics are getting much attention today as one of the biggest opportunities for improving overall performance in the contact center. What is the difference between reporting, analytics, and performance management? This session is designed to help contact center managers and analysts understand these important functions – and the associated technologies – in order to make better decisions. Attendees will learn the basic roles of each of these three major functions, how they differ, and how they interrelate. Discussions will include how and when to apply these functions based on the specific challenges you face and how to communicate the results to your stakeholders.

Students will learn to:

- Develop a reporting strategy aligned with enterprise mission and goals.
- Identify the sources of data to be utilized in reporting and analytical tasks.
- Describe the role of performance management supported by reporting and analytics.
- Identify some of the technologies involved in analytics and performance management.
- Recognize best practices for communicating performance results to each of the stakeholder groups.

Other Operations/Business Management Training Options

Private On-Site Seminars
The Call Center School faculty can bring our popular Operations/Business Management class to your site. The cost for the two-day delivery is $8,000 (plus GST, instructor travel expenses if any) for up to 20 students.

Registration
You can register here, email us: enquiries@greatoutcomes.co.nz or call us to register on 09 523 1400.