Evaluation Report

<Company Name> Phase II Project

Submitted to the Senior Site Director

By

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Table Of Contents

Summary

The Phase II project aims to provide additional trainings to new call center agents employed by <Company Name>. The purpose of the project is to increase revenue and profitability for the various sites and company by increasing agent proficiency and productivity and to lower attrition rates by retaining more agents past the 60-day mark. The project has 5 additional weeks of training beyond the first 5. It includes 2-3 sessions per week for agents to learn new information, expand on information briefly covered in normal training, and ask questions about real life call situations as they encounter them. The trainings curriculum goal is to deliver content and revisit material after agents have had a chance to experience the call scenarios in a real situation rather than the theoretical situations discussed in the classroom.

This evaluation report details the evaluation of the Phase II project. Two specific call centers were chosen for the evaluation since both centers shared upper management and training management thus facilitating less logistical planning. Nine new hire groups were selected to participate and represents all agents hired at both sites in July, August, and September of 2013. The evaluation examined data relating to each of the three main objectives: increase productivity, increase proficiency, and decrease attrition. Qualitative data was also collected via focus groups to gauge participant feelings and opinions of the Phase II trainings.

The evaluation found that the project was meeting 1 of the 3 stated objectives, but the 1 objective met was the most important as far as cost and revenue are concerned. The evaluation also found some irregularities in one of the sites and recommends an analysis of the logistics of scheduling and attendance of the project at that site.

Program Description

Agents are initially hired and attend a three week training program followed by two weeks of on-the-job training. The Phase II project is designed for agents that have just finished on the job training. The project includes additional training session designed to target specific areas that are most commonly encountered during phone calls and often the most difficult for new agents to handle. They would deliver new information and reiterate previous information after the agent has had real-life exposure to the call types. The Phase II trainings are delivered in 2-3 sessions over the first 5 weeks of the agent's employment after their on-the-job training session. Each session ranges in time span from 30-90 minutes.

Program Objectives
The program has three main objectives. For the purpose of the objectives, employment actually begins on the first day in which agents start taking phone calls during the on-job-training beginning on week four. The three main objectives are:

- Increase agent productivity so that agents are meeting or exceeding the productivity goal. Productivity is the measurement of how often an agent is taking phone calls as opposed to how many hours they work. The goal during the evaluation period was 90%.
- Increase agent proficiency so that agents are meeting or exceeding the proficiency goal at 60 days of employment. Agent proficiency is a measurement of how an agent performs while taking calls. The agent proficiency is an index and can score as high as 4.0. Proficiency has different goals depending on how long agents have been employed. Agents are expected to reach a proficiency index level of 2.55 by 30 days of employment,

3.00 by sixty days of employment, and 3.25 by ninety days. For the purposes of this evaluation, proficiency will be measure at the 60-day mark.

- Reduce attrition. This is the most critical objective as it directly concerns profit and revenue streams for each site and the company as a whole. Attrition is when an agent resigns or is terminated. The attrition rate measured during this evaluation is called sixty-day net throughput. This is simply the amount of agents left in a particular training class after sixty days on taking calls.

For a complete description of how each of the major data sources is computed and calculated, please see appendix A.

Program Components

The Phase II project consists of 14 different training sessions covering various topics that agents briefly touch upon in initial train in, do not cover in initial training, or cover in depth in initial training but need refresher sessions. Each training session is let by a trainer and can be anywhere from 30 minutes to 90 minutes and are spread over the course of five weeks. The Phase II trainings start directly after on-the-job training.

Training materials include PowerPoint presentations, interactive tools delivered via the company's online learning portal, facilitator's guides, and participant workbooks. All material can be revised and updated based upon trainer, manager, or even participant input. The program is designed to be fluid and adaptable so that the agents get the most out of training.

Evaluation Method

Participants

The participants selected for the evaluation of the Phase II project were hired in two different call centers operated by <Company Name> during the months of July, August, and September of 2013. A total of nine classes were hired totaling 189 agents during those months. By the end of the evaluation period, 123 agents remained employed and it is their data that will be used for the evaluation. The agents selected for the evaluation are a sample of the total number of agents hired by <Company Name>. <Company Name> operates four different sites devoted to the same client. Since trainees were selected from two different call centers, they represent approximately 50% of the population. The two call centers operate under the same senior site director and training managers as well as Phase II project staff and trainers, so it was more feasible to select agents from those two sites. Additionally, one of the sites is a traditional call center that is situated in an office complex. The second site is a virtual site in which agents train and work from their homes and interact with customers via the internet and virtual private networks.

Project Stakeholders

The Phase II project is made up of trainers, managers, and curriculum developers. Each has his role and function in the project and each contributes his own unique ideas and experience to the training material and training sessions. Without each of these individuals, there would be no data to collect. The managers help to manage expectations and allow for the scheduling of the Phase II sessions. The training manager is responsible for approval of curriculum changes and additions proposed by the trainers. The trainers and associate trainers are responsible for delivering the curriculum and reporting need for changes as determined through experience and training.

Procedures

During the evaluation period, the Phase II project, the project ran as planned. Each of the nine classes of new hire agents, successfully completed the Phase II training. No irregularities occurred during the evaluation period. During the evaluation period, the principle evaluator monitored several Phase II sessions, as they were in progress. One was conducted in an actual call center, the other was an online session. Data was not specifically collected from the observations other than to note that the session were conducted normally and without irregularity. The principle evaluator also conducted two focus groups that included agents from four different Phase II groups. One focus group was conducted in-center and the other virtually. Data from the focus groups was qualitative and recorded in the form of notes and observations made by the principle evaluator. Primary source data was collected that <Company Name> routinely collects and stores in databases hosted on servers located at their corporate headquarters. Data that was routinely stored on company servers and collected for the evaluation is quantitative in nature and was analyzed by comparing evaluation data to company goals for that data source.

Data Sources

Three primary data sources were collected and analyzed as well as one secondary source. Each of the primary data sources was collected from the company servers. The data sources are:

- Agent productivity statistics were collected on day 60 of each agent's employment and compared to the company goal of 90%. A
- Agent proficiency values were also collected at the 60 day mark and compared to the company goal of 3.00.
- 60-day net throughput was computed for each class and compared to the company goal of 56.50%.

It is important to note that although, 189 agents initially participated in the evaluation, data from all participants was not used in the final analysis. Data for agents that resigned or were terminated before their 60-day mark was excluded from the data analysis for the sake of data reliability. Each participant's data had to be measured at the same point in their training to accurately evaluate the Phase II program. After adjusting for attrition, 123 agents were left in the data pool. For a detailed description of how each data measurement is calculated, please see appendix A.

A secondary data source was used and collected by the primary evaluator. It's qualitative in nature. Focus groups were conducted in each site included in the evaluation. Two groups of new hire classes were used in each focus group. The questions focused on how the agents felt about the Phase II trainings, what they feel was the best part of the trainings, and what could be improved upon. For a detailed list of questions asked in the focus groups please see appendix B.

Results

While agent proficiency rates, on average were lower than the goal set by the company at the 60-day mark they were not significantly lower. The average agent proficiency was 2.94 for the entire sample. 53 of the 123 (43%) agents score above 3.0 on their proficiency index. All agents scored between 1.99 and 3.68. The traditional call center agents scored and average of 2.97 while the virtual, work-from-home agent's average was slightly lower at 2.93. Given that the company's goal is 3.00 at the 60-day mark, many of these agents are close to or above the goal

Agent productivity rates were below the company goal of 90%. The entire sample's productivity percentage, on average, was 89.71%. The traditional site was 89.52% and the virtual site scored slightly higher at 8.90% on average. 50 of the 123 (41%) of the agents managed to score higher productivity than the company goal. The data ranged from 55.32% to 96.30%.

Figure 1

60 Day Net Throughput by Group
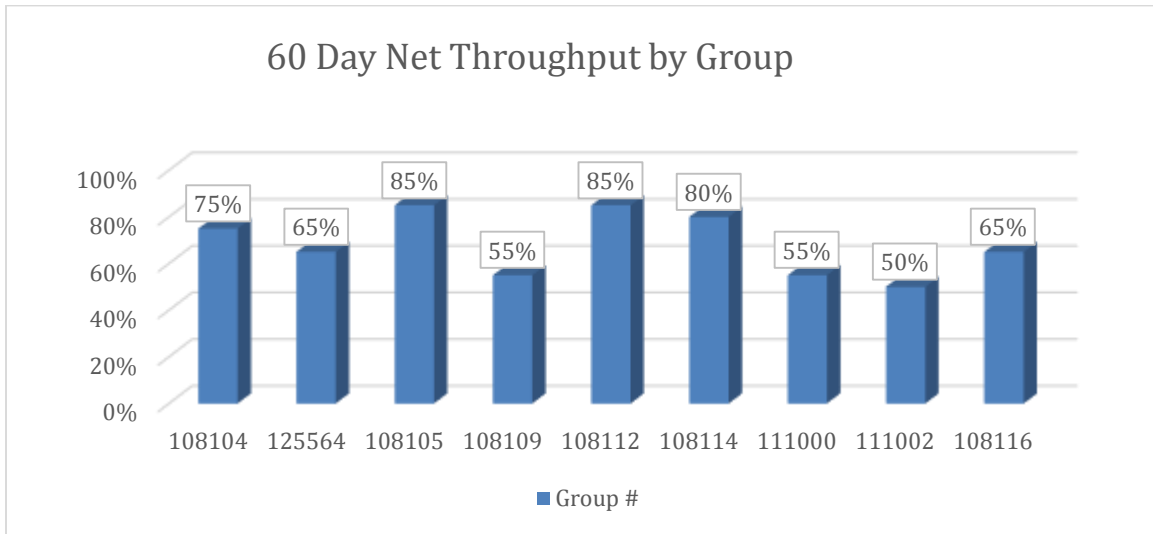
60-Day Net throughput numbers for each of the new hire groups ranged from 50% to 85% amongst the nine groups on the sample (please see figure 1 above for a breakdown by new hire group). The company goal for throughput is 56.50%. The traditional site's throughput numbers ranged from 55%-85% and averaged 72.14%. The virtual site only had two groups included in the sample. The site was not hiring as many new agents at the time of the evaluation. The virtual site's throughput numbers were 50% and 55% with an average of 52.50%. The sample as a whole had a 68.33% net throughput.

The primary data sources are summarized in the following table.

Figure 2 - Primary Data Averages

Site / Sample	Productivity	Proficiency	Net Throughput	Notes
Sample Average	89.71%	2.94	68.33%	123 of 180 Requested Agents Remaining on the 60 Day Mark
Traditional Sample Average	89.52%	2.97	72.14%	101 of 140 Requested Agents Remaining on the 60 Day Mark
Virtual Sample Average	89.90%	2.93	52.50%	21 of 40 Requested Agents Remaining on the 60 Day Mark

The secondary data source showed some feedback that provided agent ideas for improvement as well areas that were working well for the program. This data has no statistical merit and will be included in the discussion and recommendations section.

Discussion

The purpose of the evaluation of the Phase II project was to determine if the project was meeting the program objectives of increase both productivity and proficiency as well as lower attrition. The evaluation purpose also was to suggest areas to improve the program as well as to assist management in making the decision to continue or discontinue the program.

The data shows that net throughput is well above goal showing an 11.83% difference, for the sample group. This is promising since net throughput is one of the largest financial indicators of a call center. On average it takes approximately $24,000 to train one new hire group. The 60-day mark is the point at which the training costs have been recouped and that particular agent starts to generate profit for the site. The Phase II program is definitely meeting the objective of decreasing attrition. It is worthy to note, however, that the virtual call center had net throughput numbers below the goal in both of the sample groups taken from them. This could just be a data anomaly or it could mean a fundamental difference in delivery methods that may not generate the same effects. More data is need to make this determination. Net throughput number should be analyzed from outside of the sample to determine a pattern once the hiring patterns rise for the virtual center.

The data for agent proficiency shows that agents are not quite meeting the company goal by their 60-day mark. Although 43% agents of the sample did, 57% did not. The sample agents, on average missed the goal by 2%. The virtual center, once again, scores a lower average than its traditional counterpart. The difference in data for proficiency between the two sites in nominal. Although the numbers are close, the sample is coming close but not quite meeting the goal. Some changes to curriculum may be needed in order to target the areas that the agents are not scoring well in.

Data for productivity was not as encouraging as throughput. The average productivity rate for the entire sample was 89.71% which was 0.29% below the company goal. The traditional site averaged at 89.52% and the virtual site scored higher at 89.90%. The Phase II project does not seem to be increasing agent productivity. Productivity is the amount of time an agent is taking phone calls. The Phase II project adds additional training necessitating that agents be on the phone less. It stands to reason that productivity numbers may go down. It may be appropriate for the company to adjust their productivity goal for agents participating in the Phase II project if the program continues.

While the virtual site seems to score lower in the main objective data, it scores higher in productivity. It is possible that some more analysis should be conducted into the delivery and logistics of the Phase II curriculum for the virtual site. Higher productivity could indicate that not as many agents are making it to the sessions. If fewer agents are attending and not gaining the benefit, throughput numbers might be lower and productivity lower as well.

Focus groups for each site were conducted using 4 of the nine Phase II groups. The focus groups met either in a classroom or virtually and the principle evaluator asked a series of questions. The questionnaire can be found in appendix B. Based upon the statements recorded by the evaluator, the agents found Phase II to be a positive experience. One agent in particular said, "Phase IIs give me an opportunity to ask questions about things that happen to me on calls and

get answers and the reason why. It's been nice." Other statements generally indicated Phase II to be a positive experience overall. Agents seemed to appreciate the extra trainings as far as content goes as well. One agents stated, "The information we cover is stuff that we didn't get a lot of in training. It's nice." Some agents expressed a frustration with the scheduling of the training sessions. They expressed that sometimes the training would be scheduled when they could not make it because they were not working or on long calls and there was a limited makeup options usually taking place at the end of the next session. One agent said, "I like Phase II when I could get there, but sometimes I just couldn't get off of my call and I feel like I missed out." Generally speaking, the agents enjoyed Phase II and could see the benefit in it, but had some suggestions to make it better.

Recommendations
- Analyze the logistics of agent attendance and put a more solid system in place for make-up sessions.
- Look into the virtual center's delivery method. Low throughput and proficiency coupled with higher productivity indicate that agents may not be attending and gaining the benefits of the program.
- Make changes in the curriculum to enrich the agent experience to better drive home the proficiency markers so that proficiency will improve and meet exceed goals.
- Consider lowering the goal for productivity for agents attending Phase II sessions. It's not feasible to schedule more time off of the phones but still maintain productivity goals that are in place for agents not in Phase II trainings.

Project Cost

The project cost breaks down as follows and is summarized in the Figure 3.

Since <Company Name> already routinely collects and stores the data needed for the primary data sources, data collection times and costs were greatly reduced. Data analysis times ranged about 10 hours and 2 hours were spent on each of the two focus groups and six hours observing Phase II sessions. Planning and communication involved contacting all of the correct personnel to release and collect the actual data, schedule time for focus groups, plan the focus groups, obtain permission to observe the sessions and get permission to actually use the data outside of the company. All of this together too approximately ten hours of meeting, emailing, and calling the correct individuals. Supplies were limited and included paper, power and fuel to drive to the call center for the various activities held within the traditional call center.

Figure 3

Item	Amount	Rate	Total	
Data Analysis	10 hours	62.50 / hour	$	625.00
Focus Group	2 hours	62.50 / hour	$	125.00
Planning and Communication	10 hours	62.50 / hour	$	625.00
Reporting	5 hours	62.50 / hour	$	312.50
Observation time	6 hours	62.50 / hour	$	375.00
Supplies, Fuel, Power, Etc.			$	700.00
		Total	**$**	**2,762.50**

Appendix A – A Description of metrics and how they are calculated.

An agent's main job is to handle technical support calls from customers. They have certain metrics that are tracked. Among the many metrics, there are four primary ones of the most importance to the customer experience. The first of the four metrics is Average Handle Time (AHT) which is how long an agent takes to talk to a customer (including hold time) and become ready for another call so it includes after call work (ACW) time as well. After call work (ACW) is the second metric and measures how long an agent takes after he is finished talking with a customer to become ready for another call. Claims is the third statistic and is simply the number of technical support claims (equipment replacement or technical visits) an agents creates compared to the number of calls he takes. Finally, Callbacks measure how many customers call back within seven days of speaking to an agent.

Agent Proficiency

Agent proficiency measures the four main metrics and combines them in a formula to produce the agent proficiency statistic. The formula is complex and involves percent to goal calculations. Each percent to goal calculation is calculated by the following equation. %toGoal = 1+((Goal Value-Actual Value)/Goal Value). If the actual value of the metric is less than the goal, then the %toGoal is set to 1 for the purposes of agent proficiency. Each of the four %toGoal calculations are then added together to compute the agent proficiency metric. Therefore, agent proficiency maxes out at 4.00 since each %toGoal calculation cannot be greater than 1 but can, in theory, dip into negative values.

Proficiency = [(1 + ((AHT Goal − AHT Actual)/AHT Goal)) + [(1 + ((ACW Goal − ACW Actual)/ACW Goal)) + [(1 + ((Claims Goal − Claims Actual)/Claims Goal)) + [(1 + ((Callback Goal − Callback Actual)/Callback Goal))]

Example
Agent Bart

Metric	Actual	Goal
Average Handle Time (AHT)	758	810
After Call Work (ACW)	25	20
Claims	15.75	12.30
Callbacks	26.59	27.50

Bart's Proficiency = [(1 + ((810 − 758)/810)) + [(1 + ((20 − 25)/20)) + [(1 + ((12.30 − 15.75)/12.30)) + [(1 + ((27.50 − 26.59)/27.50))]
AHT %ToGoal = 1.06   **Since Bart's AHT is under goal, this value becomes 1.
ACW %ToGoal = .80
Claims %ToGoal = .72
Callback %ToGoal = 1.03   **Since Bart's Callbacks are under goal, this value becomes 1.
There for Bart's Agent Proficiency Metric = 3.52

Agent Productivity
Agent productivity is a rather simple calculation. It takes the amount of time an agent is on the phone and taking calls (billable hours to the client) divided by the number of hours an agent works. It is expect due to various team meetings, breaks, and other offline activities, that an agent's productivity will never be 100%. The goal fluctuates between 93% and 95%.

Attrition
Attrition is simply when an agent's employment is terminated either voluntarily or involuntarily. The attrition values that mean the most to any site is 60 day net throughput. Each class of new-hire agents starts out with a requested number of agents. It is usually 20. The recruiting department fills that request by hiring the requested number of agents. In most cases they fill the request. Agents then go through a three-week classroom training session. 60 day net throughput is measured for each request or Req. number by dividing the number of agents still employed after 60 days of actual phone time. It should be noted that agents do not start taking phone calls until day 22 in their employment so the 60 day throughput mark is actually day 82 in an agents employment. This date is important because it is at this point that the agent has worked long enough and produced enough revenue from client billable hours for the site to recoup the cost of training.

Appendix B – Focus Group Questionnaire

Focus Group: _____

Date:_____

Number of Agents Attending:_____

Questions:

1.) What did you like about your Phase II training?

2.) What aspects of your Phase II training were different from your new hire training?

3.) What elements of your Phase II training could have been improved upon?

4.) In your opinion, what was the best part of your Phase II training?

5.) In your opinion, what aspect of Phase II training need to be changed? What changes might you suggest?