



CONTACT CENTRE CANADA
Answering the call for quality

CENTRES DE CONTACT CLIENTÈLE DU CANADA
Répondre à l'appel de la qualité

You Talk.

We Listen.

March 2-12, 2010

National Certification Industry Consultation Report

This report describes the purpose, process, findings and recommendations of the consultation between Contact Centre Canada, and industry participants from Vancouver BC, Calgary AB, Winnipeg MB, Toronto Ont, Moncton NB and Montreal QC.

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Contact Centre Canada: National Certification Industry Consultation Report

INTRODUCTION

Contact Centre Canada is dedicated to identifying and developing industry-driven solutions addressing human resource challenges in the Canadian contact centre vertical. Contact Centre Canada connects to industry through stakeholder roundtable discussions across the nation. This report describes the results, discussions, findings and recommendations from the industry consultation held from March 2 – March 12, 2010 in Vancouver BC, Calgary AB, Winnipeg MB, Toronto Ont, Moncton NB and Montreal QC.

PURPOSE OF THE ROUNDTABLE CONSULTATION

Contact Centre Canada is in the midst of its project planning cycle. Its philosophy is that successful planning can only be achieved if the direction of the projects is defined by the industry that Contact Centre Canada serves. The purpose of the sessions is for industry stakeholders to further explore the requirements and demand of potential certification and accreditation programs. During the consultation sessions, the proposed certification and accreditation framework were presented for discussion and input. Contact Centre Canada is committed to employing this information and incorporating recommendations into its National Certification program. It is through this process that Contact Centre Canada demonstrates its commitment to stakeholders by fulfilling its mission, “to contribute to the health and prosperity of the contact centre industry and its workforce” and its motto, ‘You Talk. We Listen.’

PROCESS

Contact Centre Canada was represented by Robert Rivard, Program Manager and Allison Chapman, Project Manager and the session was facilitated by Susan Haywood (Western Canada) and Isabelle Gonthier (Eastern Canada). The following process was designed with a goal of maximizing input from the attendees within the time available, which was 3 hours.

Step 1: Overview Presentation Contact Centre Canada

Allison Chapman (Western Canada) & Robert Rivard (Eastern Canada) presented a brief overview of Contact Centre Canada, projects completed and projects in process. Care was taken to ensure that the presentation did not bias participant points of view.

Step 2: Accreditation Brainstorming

Participants were organized into groups to discuss key topical areas of discussion:

- Benefits of Accreditation
- Value of Accreditation
- Accreditation Program Titles
- Proposed Criteria

The following trigger questions were posed to each group:

Benefits of Accreditation

“What would motivate you, as an employer, to pursue accreditation?”

Value of Accreditation

“Do you feel there is value in a 2-level system of accreditation?”

Accreditation Program Titles

“What terminology should be assigned to each level of accreditation?”

Proposed Criteria

“Examine the list of criteria to be assessed during the application review and determine what is missing from the presented list”

Guidelines for the group:

1. A recorder was chosen in each group
2. Thirty to forty-five minutes of fast brainstorming to review each program
3. Each group presented their top response to each question

Step 3: Certification Brainstorming

Participants were organized into groups to discuss key topical areas of discussion:

- Employer Benefits
- Employee Benefits
- Prerequisites for Certification
- Assessment
- Recertification

The following trigger questions were posed to each group:

Employer Benefits

“What would motivate you, as an employer, to support certification?”

Employee Benefits

“What would motivate you, as an employee, to seek certification?”

Prerequisites for Certification

“What should be an experience requirement in terms of number of years for each role?”

Assessment

“Describe a typical work situation for each of the 5 roles that could be used to allow candidates to demonstrate their skills?”

Recertification

“What should be the recertification requirements?”

Step 4: Findings and Recommendations for Accreditation

The following ideas were the results of brainstorming activity by the participants in each of the groups.

This section outlines a summary of the discussions of the industry consultation sessions as the initial stage of the consultation process on accreditation.

Benefits of Accreditation

- Enormous benefit to the industry
- National unity of the industry
- Enhance employee engagement/recruitment
- Marketing initiative to differentiate companies from their competitors
- Increase the reputation and image of contact centres
- Highlights best practices
- Inspires organizations towards constant improvement and willingness to address issues
- Cost saving initiative by increasing employee productivity and effectiveness

Additional Comments: Concerns the program would give larger organization an unfair advantage and could be too costly and time consuming

Value of Accreditation

- Universal consensus of the value of accreditation
- Accreditation should be a 2-step approach i.e. online preassessment and then an accreditation assessment

Additional Comments: Participants were concerned with the notion of a 2 layered system due to the importance of a confirmation of compliance by a third party.

Accreditation Program Titles

- Numerous discussions
- Some liked a separation by color e.g. silver and gold
- Titles should be determined by CCC

Additional Comments: Concerned about setting an unfair negative connotation on the initial level.

Proposed Criteria

Participants were provided with a proposed list of criteria to be assessed in the accreditation process.

Additions to the proposed criteria

- Reference to other channels besides call – needs to be all encompassing
- Coaching/Mentoring of employees
- “Stay” reviews (what is keeping people in the organization?)
- On boarding
- Community involvement
- Core values
- Wellness
- Need to assess if HR is involved in decision making at high levels of organization

What is not relevant to the Proposed Criteria

- Financial Management
- Leadership Analysis
- Rest Areas
- Ergonomic Policy
- Workplace Diversity Policy
- Physical Security
- Physical Facility Review
- Health and Well Being Measures
- Succession Plan
- Formal customer complaint/dissatisfaction procedures
- Organizational Structure
- Percentage involved in certification

Items organizations would not disclose

- Financial Management
- Leadership Analysis
- Employee Satisfaction Survey

Additional Comments: Participants raised concerns about the metrics that will be used for assessment.

Participants were very pleased with the concept of an accreditation program and like the model presented.

Industry believes there is an inherent value in a national recognition of adherence to best practices.

Step 5: Findings and Recommendations for Certification

The following ideas were the results of brainstorming activity by the participants in each of the groups. This section outlines a summary of the discussions based on the 5 roles.

Prerequisites for Certification

- All prerequisites should begin after the completion of an orientation/training period
- A certain number of hours should be met in order to differentiate between full-time, casual or part time workers
- Consideration should be given to time as in Agent, Scheduler/Forecaster/Team Lead
- Consideration should be given to time as a Manager and Director outside the industry
- Only industry experience should be considered for a Manager and Director certification
- Candidates should have the ability to take the certification examination early with a recommendation from a manager
- Experience with customer service or sales could be recognized in addition to industry experience
- Some roles should be prerequisites for upper level positions

Assessment

Agent:

- Agent assessment should deal with difficult or passionate clients
- Ability to service client using alternate methods other than computer system

Scheduler/Forecaster:

- Assess data and provide recommendations
- Adjust analysis and depict new scheduling
- Base assessment on decisions based on changes in the business (cal volume, staffing)
- Provide a new business model with no historical data and create a coverage model
- Business resumption: What arrangements are made to react and establish BRP models

Team Lead

- Assess ability to balance needs of direct reports and supervisors
- Escalation of passionate customer to Team Lead
- Simulated complex multitasking scenario that requires prioritizing, decision making, organizing
- Inbox exercise
- Supervisory role assessment i.e. guide and discipline subordinates
- Situation involving conflict within the team
- Situation where a Team Lead is overseeing friends

Manager

- Exercise to assess compliance with standards and regulations
- Adherence to service level agreement and service orientation assessment
- Customer recovery & Managing employee scenario – possibly absenteeism or repeated lateness
- Assess ability to create strategy to meet plan/goals provided by Director

- Decision to fire an employee including analysis, repercussions, HR impact, operational impact
- Change management scenario: Lead a change; delivery of message, execute it
- Delegation of tactical work to team leads so that manager can remain strategically focused

Director

- Exercise to assess compliance with standards and regulations
- Adherence to service level agreement and service orientation assessment
- Customer recovery & managing employees scenario – possibly absenteeism or repeated lateness
- Develop a vision to address numbers, data given
- Strategic exercise solving a major strategic challenge, HR based, financial component, problem based analysis decisions
- Managing through mergers, buy-outs
- Preparation for a profit and loss (P & L) meeting

Recertification

- Majority of participants believed in the value of recertification
- Recertification to reoccur between 3-5 years
- Agents to be recertified every 2 years and Directors every 5 years
- Criteria should be flexible, affordable and not impact candidates who live in rural/urban areas
- Create a list of criteria for programs/courses
- CCC to pre-approve criteria
- Use of on-line training and webinars
- Post secondary courses could be used towards recertification

Additional Comments:

- Feasibility of Agent Certification
- Agent certification can be difficult due to the vast array of vertical markets
- The need for Director Certification; based on the amount of training/experience
- The need for both accreditation and certification
- Accreditation should be implemented before certification
- Overall participants were excited about the idea of certification

NEXT STEPS

1. Photos and an event summary of the proceedings will be posted on the Contact Centre Canada website.
2. Contact centre Canada will send this report to participants to give everyone a final opportunity to add comments, additional feedback or thoughts.

On behalf of Contact Centre Canada, I wish to extend my sincere thanks and appreciation to all participants, who took time out of their busy schedules, to participate in our industry consultation process. We look forward to continuing our relationship and support of the contact centre industry in Canada, and welcome your feedback and questions at any time.

Sincerely,

**Donna Miller
Chief Executive Officer**