Call Center Agent Training

Best Practice

Creating Markets, Creating Opportunities
Training Best Practice

- Make sure each learner signs an attendance register
- Provide a manual
- Keep the instruction lively, practical, and interactive
  - Include videos, advertisements, ice breakers, team building, stories, and games
  - The more time spent playing with the product, the better
  - Use flash demos and test platforms, if there is no training platform available
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- Have a place to “park” issues that will be addressed later and questions that require answers
- If the facilitator’s home language is different from the learners, make sure someone is available to translate
- Assess each section as the material is delivered to ensure learner understanding
- Ask learners to complete training evaluations
Staff Training Topics

- Introduction from Managing Director and department heads, each of which explain the main functions of their areas
- Company mission and vision
- HR policies and procedures
- Basic banking, mobile money description, and associated terminology
- Product training
- Risk and compliance training
- Customer service skills
- Systems training
- Process training
- Call center metrics that will be valued and tracked by organization
- Quality assurance
Team Leader Training Topics

- How to be an effective manager
- Leadership styles
- Setting goals
- Managing expectations
- Handling meetings
- Creating an agenda
- Coaching
- Giving feedback
- Team motivation
- Time management
Training Simulations

Simulations allow agents to rehearse all aspects of their jobs, including familiarization with the technology, answering calls, and problem solving. Participants are able to role play as both callers and agents. The sessions enable staff to learn in a safe environment and to gain confidence in their abilities.

**During training**
- Split the staff, half act as customers and the other half act as call center agents. Then swap roles
- Practice standard procedures, such as greetings, change of PIN requests, and other common calls

**After training**
- Involve all the call center staff in these simulations
- Prepare at least one scenario per person
- Have each person who plays the role of the customer complete an evaluation form providing feedback on their experience as a customer, the consultant’s service level, and other impressions

**Sample Scenarios**
- The customer is upset and complaining that they want to close their account because they are not sure how to use the product and do not think that the mobile money services has any features that are useful to them.
- The customer is panicked because they lost their mobile phone. They are afraid that someone will find their phone and access their account. They are also afraid that they’ve lost all the money in their account.
- The customer has moved and is very excited about it. They have called to update their address and other contact information.
- The customer is trying to make a payment to his brother and has forgotten his PIN. The customer is very embarrassed about this, but they have tried a few times and cannot get the transfer to work because they keep getting error messages.
Evaluation Forms - Sample Questions

- Did they use the standard greeting “Welcome to XXX. Y speaking. How may I help you?”
- Did the agent ask you questions to identify who you were?
- Did the agent understand what you wanted?
- Did the agent listen carefully to your request?
- When the agent spoke to you was he/she polite and friendly? Did he/she treat you with respect?
- If your call was put on hold or transferred, did the agent explain what he/she was going to do before hand?
- Did the agent provide you with accurate information?
- Did the agent solve your need?
- Did you feel that your call, questions, and concerns were resolved?