Hiring and Managing Staff

Call Centers for Mobile Financial Services

International Finance Corporation

Creating Markets, Creating Opportunities
Human Resource Requirements

1. Create call center guidelines
2. Write Job descriptions for all positions in the call center
3. Develop interview sheets to standardize hiring
4. Work with team to identify core values
5. Inspire and motivate the team through shared activities and recognition
6. Conduct regular performance appraisals
7. Build performance schedules
1. Create Call Center Guidelines

❖ Each call center should have its own set of guidelines that are understood by all members of the MFSP management and call center staff

❖ Produce and print the guidelines, then have them signed by each staff member

❖ Include the following elements in the guidelines:
  • Values of the center
  • Sick leave policies and procedures
  • Annual leave policies and procedures
  • Call center payment policies, including hourly rates, over time, and part time staff rates
  • Call centre risk and compliance policies
  • Shift schedule arrangements, including transportation and shift swapping
3. Develop Interview Sheets

- Standardise interviews by creating an interview sheet on which responses can be scored and thoughts can be noted
  - Include a question from each of the key responsibility areas on related job descriptions
- Start the interview with easy background questions to break the ice and confirm applicant’s qualifications
- When asking questions, make them as practical as possible and ask for examples to prevent standard answers
4. Identify Core Values

- Create a sense of ownership and commitment by engaging staff in the development of the call center's core values
  - Invite call center staff to brainstorm the values they hold dear, such as honesty, respect, team work, innovation, and communication
  - Group together similar values, seeking to identify 5 core values that are shared by everyone
  - Define each of the core values to make sure there is common understanding
  - Ask for suggestions of pictures that could depict each of the core values

- Once identified engage the team in supporting the values
  - Create a values wall that identifies values and the images
  - Have weekly challenges and get teams involved in promoting the value of the week
  - Be creative, and find many ways to remind the team of the values they all hold
5. Inspire the Team

- Money is not the greatest motivator - respect, a sense of accomplishment, and recognition are!

- Inspire and motivate the team members through special events, team building exercises, awards, and other creative ideas
  - Theme days that include decorations, fancy dress, or small gifts
  - Celebration of national and religious holidays
  - Monthly recognition of birthdays
  - Pin board with photos of staff
  - Team picnics, karaoke nights, sporting events, and other activities
  - Team challenges such as knowledge quizzes
  - Performance chart that shows call centers targets set and achieved
  - Top achiever of the month award
  - Tip of the day that provides customer service or product related knowledge
  - Bell for individuals to ring when certain targets are reached
  - Team identity, such as a name, logo, and/or motto
6. Conduct Performance Appraisals

❖ The aim of a performance appraisal is to:
  • Give employees objective feedback on performance
  • Identify employee training needs
  • Form a basis for management decisions, such as promotions or disciplinary actions
  • Facilitate communication between employees and management

❖ Create performance appraisal documents
  • Ask the staff what they see as their Key Responsibility Areas (KRAs) and how they think evidence can be found to support their performance in those areas
  • Extract information from the job descriptions, highlighting he KRAs
  • Then create a consolidated list from the two sources
  • Organise these KRA's into 4 areas (financial, customer, process, and people), then weight them by importance for each job type
  • Determine how each KRA will be measured, options include metrics, QA scores, customer survey scores

❖ Have each individual peer reviewed by others in the team and get a development plan from the individual being assessed
Questions for Peer Reviews & Development Plans

❖ Sample peer review questions:
  - What should they STOP doing?
  - What should they START doing?
  - What should they CONTINUE doing?
  - Contributes to the team – scale of 1-4
  - Reliable for meetings – scale of 1-4
  - Respects team member’s opinions – scale of 1-4

❖ Sample development plan questions:
  - Name one area of your work that you would like to focus on and improve during the next 3 months.
  - What assistance, training, or support would you like from your team leader or business to improve your performance?
  - What are your career interests, or medium to long term career goals?
  - How do you plan to acquire the skills and knowledge to achieve your goals?
  - How can your team leader or the business help you with your goals?
7. Build Performance Schedules

- To create a schedule either use Workforce Management software, if it is available, or create a schedule in Excel.
- Ensure that the schedules are available at least a week in advance, a month in advance is even better.
- In Excel:
  - Position dates across the top of the spreadsheet and put the name of each staff member down the left side.
  - Use the forecasting feature of the CC Modeler Pro tool to choose a color or abbreviation for each shift.
  - From the Modeler, determine how many staff you will require for each shift.
  - Next to each name, insert whether the person is on or off shift, specify shift if on, or provide other information for days off, training, and so on.
  - In a multi-language call center, be careful to ensure that enough multi-lingual staff are available to meet all the language needs.
  - Schedule lunches around peak hours - those that work the early shift will have a mid morning lunch break and those on late shift will have a late afternoon lunch.
- Once the draft is developed, involve your staff to be sure no important events or preferences have been overlooked.
- Email final schedule to staff, make sure policies around shift swapping are clear.