

Chapter 4 –Staff Management

Effective staff management includes a plan for hiring, training, managing, and evaluating staff performance. The number of staff and staff positions should be sufficient to handle the volume and types of customer inquiries expected. Staff management includes determining staff qualifications and positions consistent with the center’s scope and anticipated enhancement or growth goals.

Staff Management Plan

The first step should be to draft a Staff Management Plan. Developing a Staff Management Plan will help ensure that appropriate staff is in place and that the staff is qualified to provide appropriate responses to customer inquiries. Staff qualifications by position and training for both the center staff and partner staff (if applicable) should be addressed in the plan. Like the center itself, the plan may be simple or complex, but the basics – see “Basics Staff Management” should be addressed for all One-Call/One-Click Centers.



Staff taking and making calls are often called agents, advisors, navigators, or customer service representatives

Staff Resources

The most important qualification for all call center staff is their ability to provide person-center customer service. Looking at the provision of information from the customer’s view may help clarify how best to do this.

Basics – Staff Management

- Staff Management Plan
- Adequate staff to handle existing and projected volume
- Call Center Manager
- Hiring
- Initial Training
- On-going training
- Performance Evaluation

Customer View

- ***Customer first impression – was phone/website easy to access?***
- ***How was customer treated – was agent professional and courteous and did agent understand customer’s request?***
- ***Did customer get information desired – was information appropriate, accurate and up to date?***
- ***Was customer able to act on the information received – was the customer able to get the service requested?***

Person-centered focus requires that all staff have good customer service skills and experience in working with a broad variety of customers of different ages with different backgrounds, and

abilities. These are skills and experiences that should be considered in interviewing staff for all call center positions.

The manager or supervisor of call center staff and operations is essential to ensure efficient functioning of the call center. Depending upon the size and complexity of the call center, there may be staff assigned as team leads for designated shifts. The hours of operation, projected volume, and the average amount of time required for each call will determine the number of call center agents required. If an IVR (Interactive Voice Response) is part of the center's operation, this will impact the number of agents required as well.

Some call centers may provide counseling services that provide additional assistance to customers with multiple and/or more complex needs or where specific information and education will assist the customer in obtaining the service(s) needed. In this case, counselors will need to be hired to meet the needs of the type of counseling the center provides. It could be "mobility options counseling" to help the customer understand the transportation options that will work best for meeting different needs (e.g., medical appointments, grocery shopping). Some centers may provide other services such as mobility management or travel training, and these positions may be housed in the call center or provided by one of the partner organizations. How these positions are integrated into the overall functioning of the center should be considered in developing the Staff Management Plan.

Although the number and functions of call center staff may vary, the positions that may be found in call centers include:

- supervisor/manager,
- agent/navigator/customer service representative
- team lead,
- specialist/counselor,
- mobility manager,
- technology specialist,
- resource manager, and
- quality assurance specialist.

Basics – What is Mobility Management

- Mobility management is assisting transportation-challenged populations -- youth, people with disabilities, older people and people with low incomes -- to get where they need to go so they can live fruitful lives in their communities.

Partnership for Mobility

When hiring staff for these positions, the educational requirements for certain positions should be considered. For example, if providing counseling on human service issues, an MSW may be required.

All call centers will have a person who answers the phone and interacts with the customer. Although the name for the position can vary – agent, customer service representative, navigator, - the basic requirements will be similar. (See call center agent job description in the box below,)



Call Center Agent Job Description

- Education and Experience
 - High School Diploma or equivalent
 - Customer Service training or experience
 - Call center experience
- Skills
 - Excellent customer service skills
 - Basic computer knowledge
 - Knowledge of ride scheduling processes, if appropriate
 - Good communications skills
 - Good listening skills, with emphasis on empathetic listening
 - Problem solving
- Responsibilities
 - Answer calls and respond as appropriate to emails, voice calls, web chat, tweets, texts, and Face Book
 - Provide customer information using appropriate resources
 - Route and link calls
 - Identify and escalate priority calls, such as emergency, crisis, and complaints
 - Record data on customer calls as appropriate
 - Follow-up customer calls, if appropriate
 - Comply with Privacy, Security, and HIPAA
 - Complete logs and reports as appropriate

Call Center Manager

The Call Center Manager is critical to ensure smooth functioning of the Center. The skills and experience the manager should have depend upon the center functions and complexity. For example, the center may link to multiple partners, be a function of an existing center, handle outbound calls as well as inbound calls, be operated using a simple telephone system or call center software, or may link information to different transportation schedulers. All of these

functions should be considered in determining the appropriate experience and skills required for a Call Center Manager. The Call Center Manager should be experienced in managing a call center regardless of whether it is a simple or complex center. If the call center uses call center software, it is not essential to have experience in the specific call center software; however, it is important to have experience managing a center that uses call center software.

Some of the qualifications and experiences to consider including in a Call Center Manager Job Description are described in the box below. These qualifications and responsibilities are not all-inclusive but provide a beginning place to start when developing qualifications for a Call Center Manager.



Call Center Manager Job Description

- Education and Experience
 - Bachelor's Degree in related field
 - 2 or more years managing a call center (preferable)
 - Minimum of 1 year previous customer service experience
- Skills
 - Excellent customer service skills
 - Budgeting
 - Report generation and monitoring
 - Staff recruiting
 - Coaching or staff training
- Responsibilities
 - Day to day managing of call center staff and operations
 - Scheduling staff work
 - Managing adherence to protocols and standards
 - Overseeing management of information resource protocols
 - Providing on-going staff supervision and training
 - Overseeing adherence to quality control system
 - Developing and tracking staff and center performance reports
 - Overseeing vendor and equipment performance to ensure it meets center requirements
 - Managing volunteer staff, if applicable
 - Monitoring and projecting call volume to ensure adequate staff

Training

Staff training should be on-going, but it should start with initial training for all staff. Generally, after a formal training period, new staff should spend some time monitoring existing staff calls

before being put on the phones to handle calls independently. In some centers, the manager may sit side-by-side with new staff and listen to calls as they are being made as part of the initial training. The size of the staff and the volume of calls will determine whether side-by-side initial training or monitoring existing staff calls is feasible and the timeframe available for these activities.

The initial training should focus heavily on good customer service skills and the over-arching principle of a person-centered focus to assisting callers. Initial staff training should generally include:

- Customer service skills
- Professional conduct (ethics, confidentiality, etc.)
- Standards and protocols
- Performance Expectations
- Quality Assurance
- Technology and equipment usage
- Human Resource processes
- Disaster call center procedures



Role playing in staff trainings can provide staff the opportunity to provide input based upon their experiences and give them an opportunity to be a part of the solution

Subsequent training should take place on an on-going basis. It can be formal or informal or a combination of both formal and informal training. It could be individual based upon review of calls and quality assurance reviews. It could be weekly, based upon discussion of weekly calls by staff and management. It could be monthly based upon reinforcement of protocols and standards. It could encompass all of these training times and methods, but regardless of which methods are used, training should be on-going with the expectation that it will improve and strengthen staff performance and the service delivered to customers.