

Hiring CSRs

A three-stage hiring process helps find agents with the necessary skills and attitude

Hiring customer service reps who are unsuited to customer service is a costly mistake. As long as they stay on the job, they alienate customers and drag down group performance. When they leave — which usually happens quickly — they have to be replaced. The resulting turnover strains recruiting and training capacity, drains customer service managers' time and energy, and depresses the morale of the remaining employees. According to consultant Kathy Dean, managing partner of Banks and Dean (Milwaukee, WI), each replacement costs about \$10,000. "It's like writing a check and lighting a match," Dean says.

How can you increase your chances of hiring the right people? The first step, says Dean, is to be clear about your organization's culture and mission, so that you'll know what you're looking for. A CSR needs one set of skills to work in a call center that prizes operational efficiency above everything, and another set of skills to work in a high-touch, customer-intimate call center. Managers also need to know what minimum skill levels are necessary, and what skills they can develop through training.

Psychometric testing can find "diamonds in the rough."

Finding the right candidates

Once you can articulate the type of candidate you are looking for, it's time to bring human resources into the picture. Customer service managers often complain that HR doesn't select good candidates for CSR slots. But HR can't be expected to have first-hand knowledge of this subject; it's up to customer service managers to educate them about the skills and attitudes required.

Working with HR, you can develop a structure for the hiring process. Some companies make the mistake of jumping directly from screening to hiring, without thoroughly vetting candidates. Others do a poor job of screening and send unqualified candidates for interviews, wasting the interviewer's time. Above all, Dean says, you should resist the temptation to short-circuit the process and hire people just to fill up a training class. It's better to have half-full training classes than to have CSRs who don't belong in the job.

Screening for "diamonds"

Dean recommends screening not only for skills but for talent and personality. Psychometric testing, or personality profiling, is far more

accurate and unbiased than interviewers' rules of thumb (such as, "I won't hire anyone who doesn't make eye contact with me"). Because psychometric tests are blind to age, race, and gender, they can help find what Dean calls "diamonds in the rough."

A number of testing providers have recently begun adding psychometric tests to their skills-based offerings. Typically, these tests can be taken online and scored instantaneously by computer.

LOMA, an Atlanta, GA-based association providing research and support to insurance and other financial companies, introduced a test in 2003 that measures preference for customer service work. The test was developed based on interviews with customer service managers and observations of CSRs at work. Originally created for the financial industry, the test is now being marketed to other industries as well.

Questions on the LOMA test focus on three areas: whether test subjects enjoy working with a wide variety of people; whether they like to work in highly structured environments with strict rules and repetitive tasks; and whether they are comfortable working on short-term

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projects requiring fast turnaround time. Since the questions don't explicitly mention customer service work, it's hard for test takers to know what the "right" answers are.

According to Nicole Overmeyer, a business development associate at LOMA, preliminary research shows that test takers scoring in the top half are 45 percent less likely to leave their jobs in the first year than those scoring in the bottom half. Companies generally set the passing grade even higher than the 50th percentile, screening out all but the top 20 to 40 percent of applicants.

Another new offering is the Identity product from SkillCheck (Burlington, MA). Identity's customer service aptitude module tests for traits such as disposition to help others, self-confidence, and the ability to manage stress. Additional modules, such as the one for teamwork, might also be relevant for CSRs, depending on the culture of the customer service department.

Jon Haber, SkillCheck's president, suggests testing your existing staff first and then using the testing tool to spot candidates who closely match the scores of your top CSRs.

Interviewing

Candidates who pass the screening phase should be interviewed. Some of the interview questions might emerge from the screening process — for example, SkillCheck's Identity test reports suggest personalized interview questions based on the candidate's test scores.

Usually, interviewers use a standardized list of questions. To make sure interviewers will spot the right people when they see them, Dean suggests listing all the competencies you are looking for — both behavioral and technical — on a score

Sample interview score sheet

Use a score sheet similar to this to help identify in candidates both the behavioral and technical competencies you are looking for.

Competency	Rating (1 to 5)	Explanation
Customer service focus	_____	_____
Accepts responsibility	_____	_____
Work ethic	_____	_____
Able to collaborate	_____	_____
Manages conflicts well	_____	_____
Handles multiple tasks	_____	_____
Solves problems well	_____	_____

sheet. (See sample below.) Link each of the competencies to performance measurements that you already have in place, and tie them to business goals.

Interviewers can elicit information about each competency on the score sheet — for example, "Describe a situation where you had to probe to understand a customer's needs. What was the situation? What did you ask? What was the outcome?" Based on the answers, they can rate the candidate on each competency and explain each answer: "This candidate gets a 5 for customer focus because he showed real sensitivity to the customer's needs."

If possible, include several people in the interview room. "Team interviews can be helpful because they can ask each other, 'What did you hear?'" says Dean.

Fitting into the culture

If the candidate is rated highly in the competency interview, a supervisor or manager should perform a second interview to gauge the candidate's "fit." The supervisor might ask what kind of environments the candidate has worked in, and where she has

been most successful. This interview might result in the supervisor vetoing the candidate. More likely, it will give the supervisor some guidance about how to maximize the candidate's potential once she is hired.

By the time the candidate arrives at this final stage, Dean says, the interviewer shouldn't have to think about whether he likes her, or whether she's qualified to do the job. Instead, he should be asking whether she will be a good return on investment, add value to the organization, and perform well in this company's particular environment.

Following each step of the hiring process maximizes your chances of bringing in CSRs who are motivated to stay in the job and perform well. As Dean puts it, "The more structured and measurable your hiring process is, the more predictive it will become."

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