Transforming CSR Performance in Call Centers

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PointLeader Research Series 2019

ABSTRACT

The PointLeader Research Series 2019 presents actionable results from our library of job analysis, assessment validation, and performance improvement studies for HR professionals. In this paper, we describe how research driven improvements to selection, training, and team building transformed customer service representative (CSR) job performance and retention across five US call center locations.

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A longitudinal criterion-related validation study of the PointLeader Potential Assessment (PPA) was recently conducted with data from 13,455 customer service representative (CSR) applicants to five US call centers. This white paper describes how the PPA: (1) significantly reduced attrition rates; (2) accurately predicted interview outcomes, attendance, training, sales and computer performance; and; (3) caused no adverse impact for applicants.

Predictive validity model

Initial use of the PPA in the call centers was predicated on existing validation results and practical experiences with identical jobs in similar situations. According to the Uniform Guidelines, this approach is an acceptable form of validation evidence to use until local validity evidence is available for review. Utilizing our model based approach to improving outcomes, we conducted validation analyses using PPA and outcome data from 5,000 call center CSR applicants over 6 months; cross-validating model parameters with data from 13,455 applicants.

Job analysis

To identify the target for our prediction efforts, we conducted a behavioral job analysis by observing CSRs in the sites and interviewing fourteen subject matter experts (SMEs) with successful experience in the CSR, trainer, and/or leader positions.

Results were compared and synthesized with those from O*NET for same job. Validation evidence for the target CSR job profile was found from research in the call center industry and retail organizations. (Contact Babel, 2017).

Predictive assessment

The PPA, a dynamic 15-minute assessment consisting of 180 multiple choice questions that simply ask the individual to agree or disagree with statements about oneself, or, to solve work-related problems, was modified with call center centric items to increase applicant engagement and assessment completion. This effort was successful, in that 95% of the applicants completed the entire assessment – a 30% higher completion rate than historically reported for unproctored online assessments.

The individual's potential on each competency were calculated from the predictive profile of theta scores on the ten PPA scales. Potential scores on each competency were used to determine fit to the target CSR job based on the position profile generated from the job analysis. The level of fit was used to determine each applicant's likelihood of success as a CSR at the site.

Customer Service Representative

- Concern for Others
- Teamwork
- Trustworthiness
- Dependability
- Technical Knowledge
- Results Orientation
- Problem Solving
- Persistence
- Work Attitudes
- Stress Tolerance

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Six Personality Factors	Agreeableness	Pleasant and nice to be around
	Conscientiousness	Hard-working and follows the rules
	Extraversion	Enjoys social interaction
	Openness to Experience	Creative and open-minded
	Sensibility	Calm and reasonable to deal with
	Leadership	Thinks, acts and is driven to lead others
Ability Trio	Emotional Intelligence	Able to understand and express emotions
	Strategic Intelligence	Ability to identify problems that need solutions
	Tactical Intelligence	Ability to solve problems
	Derailment	Explodes or isolates when faced with dilemma

Validation results

Results from validation analysis for the CSR job at the PPA scale level included:

- Interview outcome data were analyzed for 850 applicants participating in onsite, in-person interviews. Success in the onsite interviews were predicted by statistically significant differences in the PPA personality scales of Sensibility ($r = 0.41$), Conscientiousness ($r = 0.37$), Agreeableness ($r = 0.47$) Tactical Intelligence ($r = 0.25$), Drive ($r = 0.30$), and Openness ($r = 0.26$).
- Performance ratings across 5 classes/trainers on computer use for 103 trainees over time were predicted by Openness ($r = 0.38$) and Tactical Intelligence ($r = 0.29$)
- Ratings for behaviors in the training room for 110 trainees were predicted by higher scores on Agreeableness ($r = 0.32$), Tactical Intelligence ($r = 0.29$), and Conscientiousness ($r = 0.25$); but lower scores on Extraversion ($r = -0.33$) and Drive ($r = -0.21$)
- Ratings for class attendance were predicted by Tactical Intelligence ($r = 0.25$)
- Sales performance on the floor 3 months after training was best predicted for 97 CSRs by the PPA sales scale ($r = 0.28$)

Operational use

Overall, the implementation of the PPA resulted in an average reduction in attrition rates of 15% -- taking the sites from an average 32% attrition rate to 17%. Moreover, one of the sites brought their attrition rates to below 10% for the first time in over 15 months.

Changes in Attrition% by Month Pre-PPA vs. Post- PPA
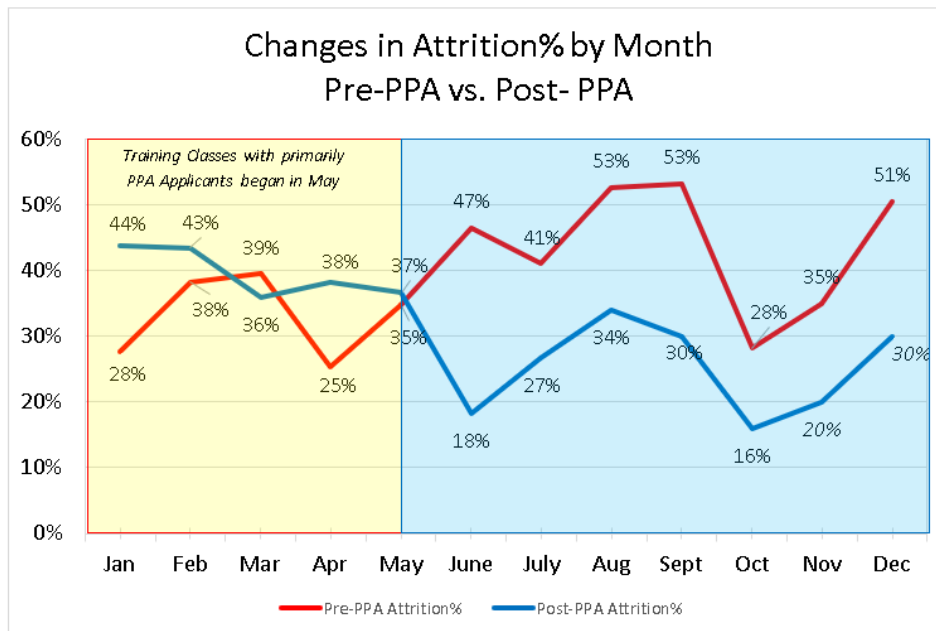
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Return on investment

Regarding ROI, backfilling the attrition of average employees with applicants who were fit the CSR job competencies provided an average return to the call center of $4,450 per new hire during each month of training. By applying these returns to an average monthly headcount of 250 trainees per site; a total benefit of $113,750 per month per site was realized by the organization.
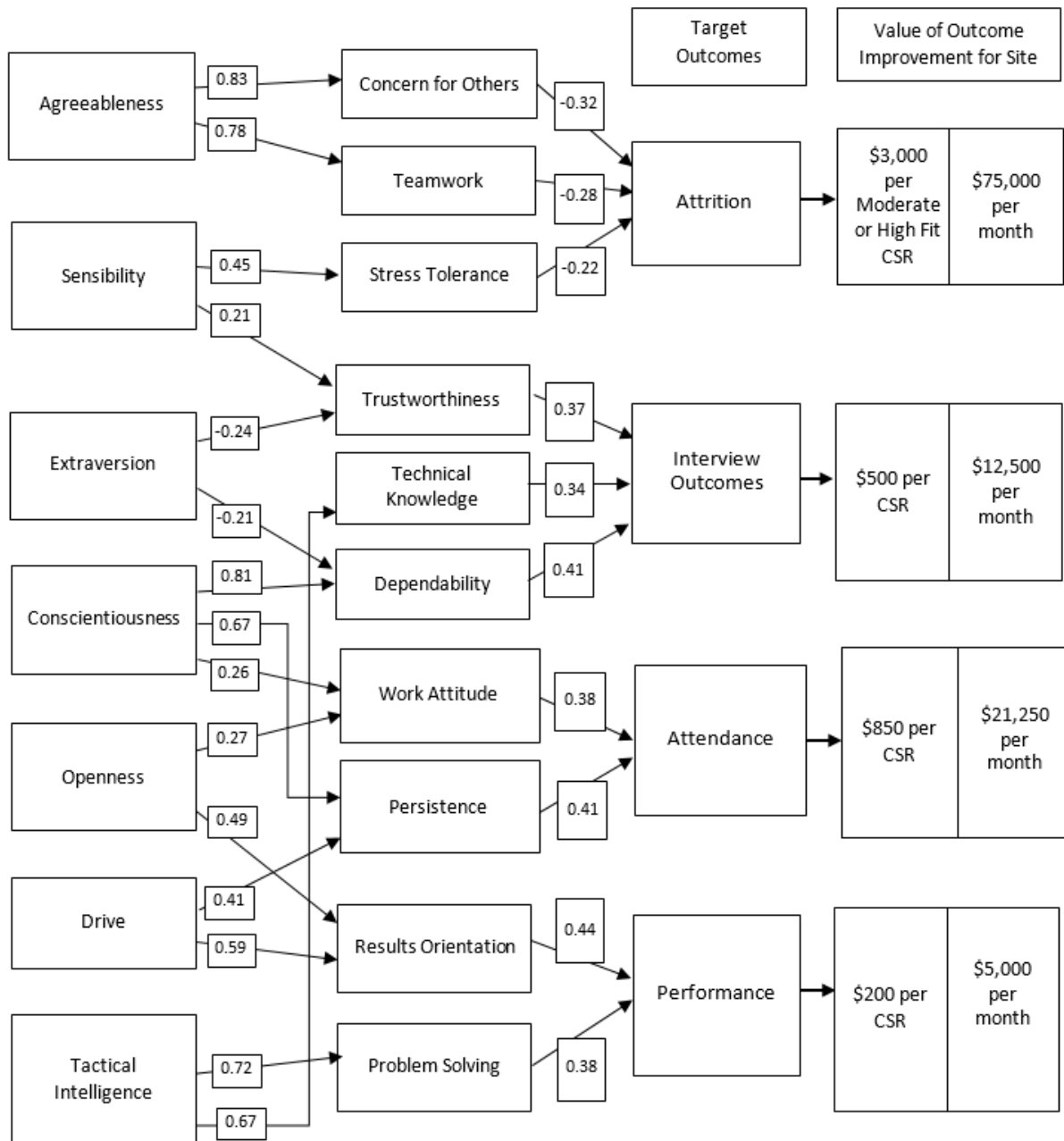
Summary

Overall, the PPA did a good job predicting how well an applicant to a CSR job would fare in the interview, training and on the call center floor. Applicant and hiring manager reactions to the selection process were positive, as described in this white paper. PPA results helped interviewers improve their work by better understanding each job applicant's fit to the job competencies and focusing on those work related behaviors in the interviews. Harassment disappeared from the training rooms that were filled with employees who fit their jobs well. Trainers became more effective as they learned to use their trainees' PPA results. ROI was impressive, as shown in the Figure above.

Based on these results, and similar results from other research studies (please write or call for a bibliography of research), we recommend using the PPA as a most effective way for the call center industry to assess applicants' level of fit to customer service representative jobs, indicating that call centers that are not currently utilizing psychometric assessments would benefit greatly from implementing them into their talent management system.