



Training Guide

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NYS Office of Children and Family Services

Human Services Call Center

1.1 Overview and Purpose

This Training Guide aims to provide best practice procedures for implementing a standardized statewide training program for the consolidated call centers. Standardized training allows for consistent performance, and can help improve customer service. The most robust training programs prioritize consistent learning, emphasize frequent and targeted coaching, evolve based on customer and agent feedback, and reinforce call center core mission goals. This guide includes guidance on conducting on-boarding training and continuing call center agent education, and implementing proper coaching and counseling to keep agents on track for success.

Of note, this document provides the core training program for the consolidated call centers; however, given the varying nature of each agency's calls, additional tailored supplemental training should be conducted. This will also cause variations in the duration of each anchor's call center agent training program.

1.2 Core Competencies & Training Delivery Methodologies

Training should address the following four core competencies:

1. Agency Orientation
2. Basic Skills
3. Technical Skills
4. Soft Skills

In order to address these core competencies, training can be delivered in a variety of ways. It is important to select the best training methods to facilitate the call center's training mission. Some training methods include:

- **Classroom instruction** – Traditional in-person instruction in a group setting
- **Web-based** – Virtual education via computer
- **Self-directed learning** – Education via hard copy manuals, books, or simple job aids
- **Shadowing** – Trainee sits with a current agent as he/she handles calls
- **On-the-job/Coaching** – Trainee learns by answering calls and gaining real experience
- **Simulation** – Instruction based on mock scenarios

Each method has both pros (e.g. self-paced learning, scenario practice, etc.) and cons. (e.g. expensive, time-intensive, etc.) and has distinct uses:

Training Method	Pros	Cons	Recommended Use
Classroom Instruction	<ul style="list-style-type: none"> • Immediate feedback and Q&A • Learning from others' questions 	<ul style="list-style-type: none"> • Little opportunity for call handling practice 	<ul style="list-style-type: none"> • On-boarding new hires • New/complex materials need to reach a large call center agent audience • Teaching policies, processes, and basic skills
Web based	<ul style="list-style-type: none"> • Self-paced • Systems interaction training 	<ul style="list-style-type: none"> • Expensive • Requires IT support 	<ul style="list-style-type: none"> • Simple content or review of previous content • Technology training

	<ul style="list-style-type: none"> • Review opportunity • Just in time 	<ul style="list-style-type: none"> • No call handling practice 	<ul style="list-style-type: none"> • E-mail or chat training • E-Performance supports
Self-directed	<ul style="list-style-type: none"> • Self-paced • Review opportunity 	<ul style="list-style-type: none"> • No opportunity for call handling practice. 	<ul style="list-style-type: none"> • Simple updates or changes • Review material • Performance Supports
Shadowing	<ul style="list-style-type: none"> • Understanding of real responsibilities and call flow • Learning by example 	<ul style="list-style-type: none"> • Time consuming • Not comprehensive in covering call types 	<ul style="list-style-type: none"> • Reinforce soft skills • Call handling understanding
Simulation	<ul style="list-style-type: none"> • Immediate feedback • Call handling practice 	<ul style="list-style-type: none"> • Time consuming 	<ul style="list-style-type: none"> • Reinforce soft skills on a regular basis • Call handling skills development
On the job/Coaching	<ul style="list-style-type: none"> • Learning by experience 	<ul style="list-style-type: none"> • Requires supervisor time • Potential negative customer service impact 	<ul style="list-style-type: none"> • Transition out of training and into the job
Blended	<ul style="list-style-type: none"> • Meets different learning styles • 	<ul style="list-style-type: none"> • Requires more planning time 	<ul style="list-style-type: none"> • Blend web based with simulation

Given the differences among the types of skills development associated with each core competency, recommended training delivery methodologies (i.e. how the content should be presented) and training audience (i.e. whether the training course be leveraged statewide) have been noted in each section.

Agency Orientation Training

As a part of the on-boarding process, new call center agents must complete appropriate training to orient them with the agency/agencies they will represent. This includes instruction on agency goals and mission, call center objectives, the nature of phone calls, and other agency-specific information. Additional training should include orientation with the anchor’s call center operations, including an overview of performance metrics and work rules.

Recommended Training Technique(s)	Agency-specific or Statewide Training
Classroom instruction Web Based	Agency-specific

Basic Skills Training

Basic skills training must be conducted in order to assess new call center agent skill levels. This component of the training program should assess the following competencies:

- Reading
- Typing
- Speaking
- Basic arithmetic
- Basic computer knowledge
- English language fluency

Recommended Training Technique(s)	Agency-specific or Statewide Training
Classroom instruction Web-based learning	Statewide

Technical Skills Training

New call center agents must also be trained on specific call center technologies used as a part of everyday operations. This includes educating agents on the proper use of the following, as applicable:

- Customer relationship management (CRM) or call tracking software
- Soft phones
- Hardware (e.g. headsets, computers, etc.)

Recommended Training Technique(s)	Agency-specific or Statewide Training
Classroom instruction Web-based learning Simulation On-the-job	Agency-specific and Statewide

Training on enterprise technologies can be leveraged for call center agent training statewide. However, some agencies may have specific applications that are critical to reference in order to answer calls. In these instances, additional training will be implemented to instruct the call center agent on the additional software.

Soft Skills Training

Soft skills are critical to teach to new call center agents as upholding excellent customer service is a high priority for the consolidated call centers. This category of training should include lessons in professional etiquette and difficult caller handling.

Recommended Training Technique(s)	Agency-specific or Statewide Training
Shadowing On-the-job Simulation Web-Based Blended	Agency-specific and Statewide

Basic soft skills training can be used for call center agent training statewide. However, given that call types vary from agency to agency, additional soft skills training may be necessary to complement statewide basic soft skills training. These additional skill requirements will be determined by each agency.

1.3 State Training Resources

Many of the aforementioned training methods can be executed using current state resources. (“GOER”) The Governor’s Office of Employee Relations (“GOER”), who manages training provided through the negotiated agreements, provides training to the CSEA and PEF represented employees in areas that are role specific. GOER has also been implementing the new Statewide Learning Management System (“SLMS”) for all state agencies to manage their training programs and i track their employee’s training history.

1.4 Training Evaluations

Course Assessment

A brief course assessment should be completed by trainees upon completion of each training course. The evaluation should include questions regarding the course materials, pace of instruction, training technique, and the instructor (if applicable). By soliciting feedback on the training courses, appropriate improvements can be made in order to make the courses more effective.

Trainee Assessment

During the course of employee on-boarding, each training course or module will be complemented with a quiz to evaluate the trainee's understanding of the material. These are particularly helpful to identify areas for individual coaching and added training. These evaluations may also reveal that a new hire is not fit to work in a call center environment. Widespread industry practice dictates that if an agent is still struggling after about a month of training and coaching, the individual should be let go.

1.5 Ongoing Training

In addition to Initial training, consistent and scheduled formal training will be implemented for the following reasons:

- Address new skill gaps that arise
- Provide training on new topics
- Update agent knowledge based on changes to policies or procedures

These three categories of trainings should be inspired by the results of regularly scheduled quality assurance monitoring. Therefore, it is critical that call center training staff work closely with the quality assurance staff to determine trends in call types, call topics, customer inquiries, and customer complaints. New or revised training programs should specifically address and resolve these issues.

1.6 Coaching & Counseling

Coaching and counseling are extremely important in order to help agents address skill deficiencies and improve their professional development.

During employee on-boarding, the training evaluation process can identify areas of struggle for individual call center agent trainees. Training supervisors should target these areas by providing additional formal training resources or informal individual coaching and instruction to trainees.

Coaching is also a critical component of ongoing training. As quality assurance monitors conduct regular assessments of agent performance, they can identify areas for improvement for individual call center agents. Similarly to on-boarding trainees, these areas can be improved through additional formal training courses or informal individual coaching.