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HIRING FOR GREAT SERVICE: RECRUITING AND RETAINING YOUR BEST PEOPLE

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HIRING FOR GREAT SERVICE: RECRUITING AND RETAINING YOUR BEST PEOPLE

BY RICHARD S. GALLAGHER

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Introduction

Hiring and retention is, quite simply, the single biggest success factor in a customer support operation. The quality of people whom you hire, and your ability to retain them, are what drive all of the tangible performance measures of a support center: productivity, response time, resolution quality, and above all customer satisfaction. More importantly, every corporate culture rests in the hands of its people. As a result, the hiring decisions you make have a major impact on the overall culture of both your help desk and the organization that surrounds it.

This SSPA Support Sense booklet picks up where your own human resources department leaves off, and discusses several specific, practical strategies that you can put to work to substantially improve the quality and tenure of the people you hire. Each are based on the best practices of top organizations from all walks of life, as well as the author's personal experience managing a 24x7 software support operation which has experienced virtually no turnover in nearly two years. They are the key elements of a process that leads to low turnover, and high employee and customer satisfaction.

Where it all starts: the recruiting process

There is a common belief that recruiting is all about finding people with the right mix of "skills" for your openings. As a result, the recruiting process often focuses on screening resumes for factors such as years of past experience, degrees and credentials. But if you manage a support center of any size, you should look critically at who your strongest and weakest performers are, and then compare them with their resume credentials - you may be in for a surprise. The odds are that your top people share intangible qualities such as intelligence, aptitude and interpersonal skills, few of which are ever quantifiable on a resume. This means that the first step in strengthening your hiring process is to examine your *real* criteria, and then work them into your procedures.

If you manage a support center, and particularly a "typical" support center, the following statement may be the most important thing you will ever read about recruiting:

Hire for aptitude first, skills second.

It is a critically important principle that is sometimes at odds with common human resource practice of simply looking at the skills and experience people have on paper. Like most practices, it is perhaps best explained by example.

One day, my human resources director called me and said, "Rich, I feel we've found a great candidate for your current support opening." I replied, "Great! What is his professional background?" She replied, "He has never held a technical position. He is a longtime college dorm advisor looking to make a career change." I then said, "OK, what about his computer background?" She said, "He has never used an IBM PC before, only Macintoshes at school." "OK," I said, "I trust your judgment, let's bring him in for an interview."

This real-life discussion led to the hiring of one of the strongest technical members of our support team. What happened is that our HR director, who has a keenly developed "sixth sense" for non-traditional candidates, did a telephone interview that confirmed that this candidate was very smart, very socially adept, and a quick study. By assessing his aptitude rather than just his skills, and by investing more training in him than most companies would, we gained a strong contributor who would normally fly completely under the radar of similar support centers who require three years of LAN, WAN, SLAM and CRAM before they will consider a candidate.

More importantly, he is not an exception. Our call center supports complex client-server applications software running in mission-critical environments. But a quick glance at the backgrounds of our support team will show people who were once librarians, farmers, cooks, and caterers as well as the usual IT and networking experts. And yet our support center is very competitive to get into, with several people often interviewed for each position filled. By perfecting the art of finding extremely smart and talented people in a wide variety of packages, and then heavily investing in training them, we have enjoyed minimal turnover and industry-leading customer satisfaction ratings.

The clear lesson from experience is that the right people, combined with training, will always produce a much stronger support team than a purely skills-based recruiting approach. And yet many hiring manager and HR professionals look primarily for traits such as degrees, computer background or past support

experience. These are at best an imperfect set of criteria for hiring support professionals, for a number of reasons:

❑ People can and do complete college degrees, even Ph.D's, while lacking important analytical and judgment skills to solve technical problems quickly. The same is true regarding interpersonal skills.

❑ Expertise in computers and software varies widely. When two people both say that they know Microsoft Excel, one may be barely able to sum a row of figures, while another could use it to design the Space Shuttle from spare parts. And even when two people have similar levels of expertise, one may have learned quickly and intuitively, while the other struggled by rote for months or years.

❑ An old joke describes what they call the person who graduated last in their class in medical school: "Doctor." In much the same way, tenure in a support center alone does not guarantee that a person is a top quality support rep.

Credentials do matter, but only in their proper context - namely, that credentials alone do not guarantee success, and lack of credentials alone should not eliminate every candidate. Some other objectives to keep in mind during the screening process include:

The up-and-coming. Candidates for whom customer support work represents an important "stretch goal" for their future career - for example, successful people from non-traditional backgrounds who might use support positions as the entry point to a legitimate technical career.

The personal success stories. Once the author interviewed a candidate with very strong computing credentials - but had never advanced during a long career, for what later turned out to be performance issues. Shortly afterward, he interviewed a construction foreman who had never worked with computers before - but he was highly successful in his previous career, retrained himself in technology following a job-related injury, and was at the top of his class in school. The latter candidate - *who would probably go completely unnoticed by traditional screening processes* - had his pick of lucrative technology offers when he graduated, thanks to his strong personality and word-of-mouth reputation.

The support pros. People with progressively increasing levels of responsibility in a support environment, no matter what their background, deserve a closer look - particularly if they share a passion for support as a career, and a profession. People like these have the potential to "infect" the rest of your team with their values and take it to another level.

With this having been said, some credentials do deserve special mention. Very specific, job-skill related certifications such as network credentials do demonstrate a specific level of competence in a core job skill. Certain support centers may require specific job skills - for example, an engineering software company may need engineers to effectively solve their clients' issues. And broader certification programs such as the SSPA's own Certified Support Professional (CSP) program show that an individual has been exposed to the principles of good support operations, and has an interest in their own professional development. But none of these credentials represents a hiring criterion per se - they are each part of a holistic evaluation that you must invest in for each candidate.

Candidate assessment - the real test

Once upon a time, most employers made hiring decisions by simply talking with screened candidates and checking references. A surprising number still do the same thing nowadays. But in today's support center, the days of discussion and gut feelings as a sole recruiting methodology are over. The level of technology required for today's support environment requires numerous metrics for success – computer aptitude, problem-solving, leadership and decision-making, among other traits. Successful CSR recruiting requires more formal assessment of aptitude than ever before, no matter what you might think about their personality or their background.

Early in my current tenure as a help desk manager, our team included a young person who had previously been a network support technician for a major computer manufacturer, and another person nearing retirement age who had made a career change from being a librarian. How did they compare? The librarian is now one of the senior technical people on the team, and one of its most productive technicians, while the network technician - who, incidentally, was very good at computer networking - constantly struggled with learning our application and eventually left.

So how do you find the right librarian, and pass on the wrong networking expert? By using the right assessment methodology. The author's personal experience has been that the quality of hiring decisions jumps dramatically by using a formal support assessment process, and is far from alone in that observation - today, an entire industry has grown up around the concept of pre-employment assessment. Here are some of the more important things to assess in a customer support environment:

Soft skills assessment. In a series of interviews that the author held with help desk managers for his 1995 book *Effective Software Customer Support*, the overwhelming majority stated that they hire for interpersonal skills first, and technical skills second. As one manager put it, "I can train people on product skills, but I can't train them to be nice to my customers." Numerous tools now exist to assess "soft skills" capabilities, ranging from standard psychological tests to certification testing offered by organizations such as the SSPA.

In some cases, soft skills assessment can also be a do-it-yourself process. At the author's employer The CBORD Group, for example, we perform a formal, quantitative assessment of customer skills using a series of real-life scenarios culled from actual support cases. Candidate responses are scored using a quantitative rating scale, and these scores are used as part of the decision-making process for who returns for team interviews. In cases like this, be sure that questions are consistently job-related, and sufficiently open-ended that people give frank and honest answers.

Technical assessment. Particularly in software support, an equally important assessment is to make sure that candidates have the technical and computer skills that they say they do, and assess how deep these skills are. This process can range from simple observation all the way to elaborate multi-media testing and assessment tools available from third-party providers. For testing basic computer skills, another option is using a provider such as a temporary help agency as a pre-screening resource - many such firms have taken a lead role in developing skills assessment methodologies for their own purposes, and make them available as a fee-based service to employers.

Aptitude assessment. Be aware that skills testing does not measure the *rate* that knowledge is gained when things change –

and in a support center, things will change! This is one of the cardinal reasons that it is important to measure aptitude alongside skills or pedigree. One of the best ways to do this is to introduce the candidate to something new (but job related), and observe their skill in learning or solving it.

In our case at CBORD, we rely on work sample testing that includes a scripted hands-on demo of one of our core products, structured similarly to a subsequent post-hiring training session. Since introducing such testing, we have avoided several hiring mistakes from people who "talk a good game" but lack good learning skills - and in some cases, the gap between past computer knowledge and the ability to learn new things is astounding. More importantly, this testing has served as a mechanism for broadening the hiring pool for CSR positions - it helps us identify those "diamond in the rough" candidates that are worth an investment in further training from our end.

While a full summary of current employee testing and assessment resources would be beyond the scope of this pamphlet, there are a large and growing number of them available today. When using formal aptitude tests, it is important – from both a practical and a legal standpoint – that they be job-related. The benefit of many commercial aptitude tests is the results of past correlational testing to specific job categories, providing a more sound legal basis for the use of these tests. However, for those who choose to follow this route, careful planning and evaluation is needed to make sure that you are using the right tests for people in a customer support environment.

One closing thought about assessment is a note of caution about one increasingly popular type - personality testing. The science of personality typology is very well developed nowadays, particularly with the growth of tests such as the Myers-Briggs Type Inventory (MBTI), and many people today feel that certain personality traits are predictors of future employment success. In a customer support environment, this can lead to a belief that personality testing is one possible way to screen for perky, happy people with good customer skills.

The author's personal experience in support environments is that service-oriented individuals come in a wide variety of personalities: effusive, taciturn, thoughtful, analytic, articulate, and more. More importantly, a diversity of personalities and viewpoints is often a critical strength in serving organizations and customer bases who are diverse themselves. Therefore, deciding "I

only hire people with a Myers-Briggs type of ENFJ" or otherwise limiting your attention to specific personality types may ultimately leave a service environment weaker over time. Focus instead on assessing each candidate's most important job-related skills, and leverage their diversity to build a strong team with a broad depth of abilities.

Team-based interviewing - making it a family affair

Despite managing a 24-hour support center, I am proud to say that in a very real sense, I do not hire any of its employees. I may sign the paperwork (and do hold final decision-making authority), but in our support center it is generally a candidate's future peers who ultimately make the hiring recommendation. One of the most powerful expressions of teamwork is an environment where the team chooses its own members - and its own team leaders as well. By using a team-based interview process that includes each member of a new hire's immediate workgroup, we accomplish much more than getting multiple opinions on a candidate. In a very real sense, we all become part of defining the group's culture, by selecting who can and cannot join the club.

Once a candidate has passed your screening and assessment processes, the next step should be an interview with their future team or workgroup. This interview should consist of much more than shaking hands and having casual conversation with candidates - it represents the one remaining opportunity to assess the cultural and professional "fit" of someone that you and your team may be working with for a long time. At CBORD, we use a very structured process for this team interview:

❑ Candidates are advised prior to the interview to spend 10 minutes teaching us something, on any subject of their choice.

❑ A remote CSR will role-play a telephone transaction with the candidate, such as having the candidate teach her how to tie her shoe.

❑ Each member of the immediate workgroup gets to meet as part of a group with the candidate.

❑ Hiring decisions are a team process, in which opinions of individual team members are respected.

The debriefing process following these team interviews represents an important opportunity to define what factors are most

important to the group, as well as what they thought about the candidate. These values may in fact change as the group itself changes: at different points in time, the team may for example seek more technical leadership, fresh ideas, or a "keeper" who is more likely to make a long-term commitment to the group. Thus, these interviews can be an important source of self-evaluation as well as recruiting. Either way, it is important to respect the validity of each person's opinion - although in a strong support team, you will often find a clear consensus of opinion on who does and does not fit in with the group.

Although a team interview process requires a greater investment in man-hours, it pays substantial dividends in turnover, morale, and quality of recruits. More importantly, when team members drive the process of hiring decisions, it creates an important sense of ownership in the success of the team. The end result of this philosophy is a very tightly knit group, not unlike a family, whose values and standards are peer-driven rather than manager-driven.

Building "brand equity" as an employer

In a very real sense, much of the work in recruiting a strong team starts long before you have an opening. By developing and promoting your image as an employer every day, you create a reputation that attracts the right kind of people to seek you out. More importantly, this public image helps self-select candidates who fit the profile of "who you are" in the marketplace. Some of the ways that you do this include the following:

Manage each interview "touch point" to deliver your message. You are selling yourselves to good candidates, every bit as much as they are selling themselves to your company. This means that your recruiting process is an important opportunity for everyone to identify and promote your corporate culture. Design your recruiting process to get your message across, including good collateral materials such as brochures and recruiting web sites, as well as a clear knowledge of selling points among your hiring managers.

Build partnerships with career change agents. By working together with resources such as local job service agencies, university placement offices and others, you help create a pipeline of good candidates when you need them. Beyond the search for current employees, internships and other paraprofessional opportunities can represent an important means to "test drive"

candidates who may have an interest in joining your team in the future, while exposing them to life in a good support center.

Build on the network of your own team. Remember the dorm counselor turned support rep mentioned in an earlier example? He was in fact referred by a friend who already worked in the support center, and this same person was eventually responsible for bringing over half a dozen new employees to the company! Some companies even take this idea a step further, such as Cisco's "You've Got a Friend at Cisco" program that lets employees bring friends to visit before they become candidates. Consider formal or informal incentives for people to refer their friends to your support center, and leverage the strength of your existing satisfied employees.

All of these points have one thing in common: the concept that recruiting starts on the inside, before you even think about candidates. A strong recruiting culture is a natural byproduct of a strong culture overall, and in a very real sense, the path to improving your hiring process begins with the growth and success of the company itself.

The four keys to retention

Turnover creates direct and indirect costs that dramatically affect the morale and quality of a support operation. The help desk profession has always had a stereotype - not always correct - of being a high turnover profession, with direct costs that can approach 150% of the annual salary of each employee who leaves. But the good news is that the root causes of turnover can be understood and managed in a support environment. This having been said, perhaps the worst thing you can do to improve your employee retention is to declare a formal "retention initiative:"

In a recent case study, Time Warner Cable of Memphis tried to address very high levels of turnover in its call center by a number of initiatives - raising salaries, creating more supervisory opportunities, and other management programs. None of them worked, and turnover remained at very high levels.

Eventually, they did what they probably should have done all along - interviewed their own employees about reasons for turnover. Two clear issues emerged: a lack of good evening child care for evening shift workers, where new employees all started, and poor communication from management. By addressing both of these issues, turnover finally headed downwards.

Ultimately, Time Warner Cable of Memphis reduced its turnover by 20% - and more importantly, its stress-related turnover by 90% - by switching from a management-defined retention initiative to a team-defined one. As you work with your own team to improve retention, here are four key factors:

Compensation equity. Competitive compensation and benefits are one of the basic retention factors for any support operation. Keep on top of industry salary surveys, as well as the local market conditions in your own area, to make sure your support center is where it should be compared with similar operations.

Career growth equity. People crave the opportunity to grow and develop, and lack of ongoing training is a key factor in job burnout and turnover. It represents one of your best investments in your human capital: Training and development activities boost your productivity as well as your retention, and studies have shown that concerns about "training people to leave" are statistically not well founded.

The industry average for support professionals is approximately 5-7 days of training per CSR each year. At CBORD, we invest more than double this time, nearly three weeks of internal training annually per CSR. Expensive? Yes – but as a result of this and other factors, turnover for other than personal or internal promotion reasons has become nearly non-existent.

Another important factor in career growth is the roles that exist for people within your support center, as well as your company. At CBORD, what was once a group of common CSRs has evolved to multiple levels of responsibility - entry and senior level technicians, team leaders, internal training coordinators, and development liaisons, to name a few. This not only provides a career path, but also provides legitimate, productive roles for people who might not have otherwise fit the previous jack-of-all-trades CSR model.

Recognition equity. Tangible and intangible recognition incentives can take many forms in a support center, including advisory roles in product development, training and mentoring roles, publishing and speaking opportunities, and other leadership opportunities such as project work. Perhaps the most important retention technique of all is to foster a culture of respect and recognition for people at all levels of your team, and move as much authority as possible into the broadest levels of the team itself.

Flexibility equity. The ability to have a job suit one's lifestyle can be a determining factor in whether some people stay - so look critically at areas such as part-time work, job sharing, and telecommuting. In today's recruiting environment, you should ruthlessly examine corporate policy and procedures to weigh the cost-benefit impact on retention. By allowing perks such as shift flexibility, varying roles and time for personal development, you harness resources that might otherwise leave, and keep them to pitch good innings for your team.

Telecommunications and networking capabilities have opened up a wide variety of flexible CSR working arrangements that were not possible even a few years ago. The use of remote agents also opens up your candidate pool to include many talented people who are homebound, disabled or come from remote customer sites. For example, CBORD first experimented with remote CSRs about five years ago, and today we have a long tradition of having many CSRs take their jobs with them when their families must relocate. One has since become a team leader, and today remote employees handle approximately 20% of CBORD's inbound call volume.

One closing thought on retention is that not all turnover is a bad thing. When you have a strong culture in your support center, it tends to self-select for your best people, with the result that poorer performers often feel unwelcome and leave. Conversely, other people leave for very positive reasons, such as career advancement within the organization. And finally, life goes on for all of us - spouses get transferred overseas, personal and family health issues intervene, life and career interests change. Against this backdrop of life as we know it, your goal as a support center manager is to create an environment where everyone feels that they are part of something important and looks forward to coming to work every morning. When you succeed at this, the vast majority of your turnover will be "good" turnover, and your culture will survive the forces of life that affect everyone.

Summary: Recruiting, retention and your workplace culture

There is a wide range of resources available today on the fundamentals of hiring, and the intention of this SSPA Whitepaper is to enhance them by presenting several powerful

ideas that have a substantial impact on customer support hiring and retention:

- ❑ Hire for aptitude first, skills second.
- ❑ Assess candidates for the right skills and the right aptitude.
- ❑ Use a team-driven recruiting process.
- ❑ Understand and define your corporate culture and your hiring culture.
- ❑ Retain your best people by developing several forms of career "equity."

By incorporating these tools into your own recruiting and retention policies, you will notice a substantial improvement in not only the quality of your job candidates, but a positive change in the culture of your entire organization. The success of your customer support operation begins with the quality of people you attract and retain, and with the right approach, you can understand and manage this process to drive your own long-term success.

About the author

Rich Gallagher is a leading authority on customer service and support operations. He is the author of four nationally published books including *Smile Training Isn't Enough* (Oasis Press, 1998), an alternate selection of the Executive Program Book Club, *Delivering Legendary Customer Service* (Oasis Press, 2000), and *Effective Software Customer Support* (ITCP, 1995), one of the first major textbooks on managing software support operations. His forthcoming book *The Soul of an Organization* examines the cultural values that drive successful organizations in all walks of life, and will be published by Dearborn Trade Press in late 2002.

Rich is currently head of software support operations for The CBORD Group, a major foodservice software vendor in Ithaca, NY. During his tenure at CBORD, he has re-engineered its training, recruiting and CRM processes as part of managing a 24-hour call center which now has near-perfect customer satisfaction ratings and near-zero turnover. He has also developed a complete suite of self-guided training materials for help desk and teleservice environments, marketed through Skills Development International. Visit Rich on-line at www.legendaryservice.org, or contact him at rsg@cbord.com.

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