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Making Sense of
On-Demand Learning
in Contact Centers Today



Making Sense of On-Demand Learning in Contact Centers Today

BY MARK W. BRODSKY

Today's contact centers may benefit from on-demand learning...if the conditions are right, people are motivated to use it and it's intelligently blended with other methods of training and performance improvement.

Give us what we want and give it to us **now!** That certainly seems to be the mantra that most are chanting these days — and not just in contact centers.

As our human affinity for on-demand services and the need for immediate gratification grows, “on demand” will apply to nearly everything we do — at home, at work, at play.

But what about the concept of “on demand” as it applies to learning? Is this what our contact centers need today? Will it help us achieve our performance-improvement targets?

Here is some food for thought on how on-demand learning could be most useful in contact centers now...and in the future.

Finding a Definition That Works

First, a coherent definition is in order,

as on-demand learning can mean many things to many people. Among those who consider themselves “on-demand learning” experts, on-demand learning is the process of enabling and encouraging workers, managers and executives to learn and refine knowledge and skills in response to their job task or performance requirements, often using technology, but sometimes not.

The learning is delivered “just in time” and includes “just the pieces” needed. Furthermore, the knowledge and skills acquired or refined are *intended* to be retained by the learner so they can be recalled or applied again in the future.

According to Mike Trotter, executive director of Purdue University’s Center for Customer-Driven Quality, people have a tendency to confuse information tools, such as knowledge management or per-

formance support tools, with on-demand learning.

“A performance support tool is something I access to get information to complete a task, but don’t necessarily need to remember,” Trotter explained. “Whereas *learning* is something that becomes a part of me; it’s an internal process, something I take with me to use again after I learned it.”

However, on-demand learning is not for every training objective. For example, sales, service and coaching skills are tough to learn on demand because of the complexity of these skills, the level of practice involved to become proficient and the time required to learn them effectively, among other factors.

Also, on-demand learning is only effective if an agent already possesses the basic skills needed. For example, providing agents access to customer service tips and techniques is not an effective use of on-demand learning to demonstrably improve service if the agent doesn’t already have foundational customer service skills.

Also worth exploring in this definition is the role of technology. There is a natural assumption that “on-demand learning” is delivered via an “e” methodology. But electronic delivery is only one method. The best on-demand learning applications use the best training method(s) given the learning objective at hand and the audience learning it.

“The face of the contact center continues to evolve,” said Barbara Bartilson, senior vice president for Learning and Development, LaSalle Bank and ABN AMRO Mortgage Group, Inc. “Current and new generations of employees are used to getting technology-delivered nuggets of information on demand and being highly entertained and engaged in the process.”

Trotter agrees. “What’s needed is for contact center executives and learning specialists to step back and view on-demand learning in broader terms and with an eye on the future demands of both customers and employees.”

At Whose Demand?

Interestingly, there’s considerable debate around the initiation point of on-demand learning. Specifically, at whose demand should the learning be available? While many assume it’s on the *learner’s* demand, other contact center profession-

als disagree and their arguments are compelling.

“Ultimately, on-demand learning is driven by customers and the company reacts,” said Jack Raymond, Intuit’s Pro-tax training manager. “When you look at it from a return on investment standpoint, it’s the most logical starting point.”

Intuit is very much “in tune” with the voice of the customer and regularly conducts FMO (Follow Me to the Office) research where they examine how clients use their products and services. Based on the feedback, specific “on-demand” learning interventions are created to align the customer experience and expectation with on-the-job performance.

Barbara Bartilson added, “It really has to encompass all of the people who are a party to the effort – the learner, company and customer – where the point of impact is an immediate business-related need that’s driving the need for learning on demand.”

A Question of Suitability

Is on-demand learning a good fit for contact centers? While “on-demand” knowledge tools seem to be a good fit, the question still remains whether on-demand learning is suitable for a contact center environment.

According to Darin Hartley, M. Ed. and author of the book *On-demand learning – Training in the New Millennium*, suitability is driven by the competencies of the on-demand learner. Hartley says the perfect on-demand learner is results oriented, takes initiative, seeks information, demonstrates self-efficacy and flexibility, learns on the fly and is goal driven and career oriented.

“In today’s contact centers, these competencies describe the people who get promoted and don’t stay on the line for long,” observed Marnee Downing, director of Training and Development for 21st Century Insurance Company. “I believe on-demand learning has a place in the contact center, but its fit is based not only on the learner, but on our ability as leaders to create engaging, content-rich learning opportunities and look past our own learning biases to understand which method(s) work best for our people, including the new millennial generation that is now entering our workforce.”

Conditions for Success

While there are many conditions that impact the eventual success (or failure) of an on-demand learning initiative, three reign supreme – the social architecture to support on-demand learning must be firmly in place, the content must be “king,” and a blend of methodologies must be deployed.

Social Architecture. One of the challenges with on-demand learning today is that, in most centers, the overall acceptance of it, both by agents and leaders, is relatively low – the appropriate social architecture or mindset is not in place.

“On-demand learning has to be firmly ingrained in the social architecture of the organization for it to take root,” said Intuit’s Jack Raymond. “This is a significant change management initiative that doesn’t happen over night.”

Raymond believes it’s important to begin developing the appropriate mindset for on-demand learning at the earliest point – the talent acquisition stage. This means clearly outlining for new employees the organization’s on-demand learning expectation of taking ownership and being held accountable for their own on-going development. This expectation is then reinforced in all training and coaching experiences at all levels in the organization.

Content is “King.” While having the appropriate social architecture is an absolute must, so is strong content – content that engages learners and is validated to develop the knowledge and skills desired. “There is a real danger with on-demand learning if the content doesn’t deliver a practical perspective,” observed Mike Trotter. “The content must be effective in helping agents develop skills and build knowledge while providing a knowledge- and skills-based assessment and measurement component that helps determine improved performance on the job as simply and practically as possible.”

Regarding content that’s engaging, while the use of fun games and provocative themes can be helpful, most training experts agree that on-demand learning is most engaging when it’s relevant to the job. “We’re suffering from information overload,” noted Barbara Bartilson. “For an employee to be motivated to use on-demand learning, it has to relate to their

work and clearly show value in the education it offers.”

Both Trotter and Raymond noted a concern regarding the increasing use of LMSs (Learning Management Systems) that offer numerous learning programs on a wide variety of topics. These systems usually reside on a company Intranet and are positioned as on-demand learning vehicles.

“What worries me is the tendency for people to think that the technology (just by way of having an LMS) will take care of their performance improvement issues,” said Trotter. “Just because you build it, doesn’t mean they’ll demand it. At some point, you need people to help develop people...on demand.”

Blended Methodologies Enhance Success. Blending on-demand learning methods with other methods – either on-demand or not – is a powerful strategy for contact centers that want to build employees’ knowledge and skills using the methods most suitable for the task.

One large financial services contact center wanted to launch training to develop its agents’ sales skills, enabling them to improve their sales conversion ratio and monthly revenues. There was also a lack of consistency in the coaching methods used by supervisors to support and develop the agents’ sales skills.

The appropriate blend for this organization featured simulation-based e-Learning for the agents and coaches (so they could learn and practice the skills in a safe, simulated environment) blended together with facilitated group discussions and on-demand learning in the form of on-demand coaching to ensure consistency and on-the-job skill transfer.

LaSalle Bank and ABN AMRO Mortgage Group are very familiar with this approach. “On-demand learning in the context of coaching has made quite a difference for us,” Barbara Bartilson noted. “It’s helped us become more effective and efficient.”

Over the past three years, LaSalle Bank and ABN AMRO Mortgage Group have evolved the training curriculum to include less classroom facilitation and more on-the-job “on-demand” coaching. Bartilson explained that with a solid coaching strategy and process in place they have reduced the classroom time needed to change behaviors.

Because there is an expectation that they'll be coached on the job (both on employee and supervisor demand), employees are spending far less time in the classroom for initial training in a particular skill. To make a change like this, the company spends significant time developing the coaching skills of its supervisors and managers using validated content and a variety of learning methodologies.

As On-Demand Learning Evolves

The use of on-demand learning is still in its infancy in contact centers, as it is in most industries. What will be interesting to watch over the years is how on-demand learning evolves to better fit the unique needs of the ever-evolving contact center and the generations staffing it.

Marnee Downing offered a good example of an information tool that evolved into an on-demand learning vehicle. "We created an electronic decision support tool that helped provide answers to agents for various tasks and customer

scenarios. What was unique about this tool was that it went beyond providing information to sharing with agents the 'why' behind the answer."

Downing said her goal was to eventually make the tool obsolete so the learner would be able to think through a similar situation in the future or help others without needing the electronic aid.

Mike Trotter sees on-demand learning – if used appropriately – evolving as a powerful skill development method for home or remote agents. "As more and more contact center executives have to deal with the reality of shrinking labor pools, the need for remote agents will increase as will the need for top-notch on-demand learning interventions."

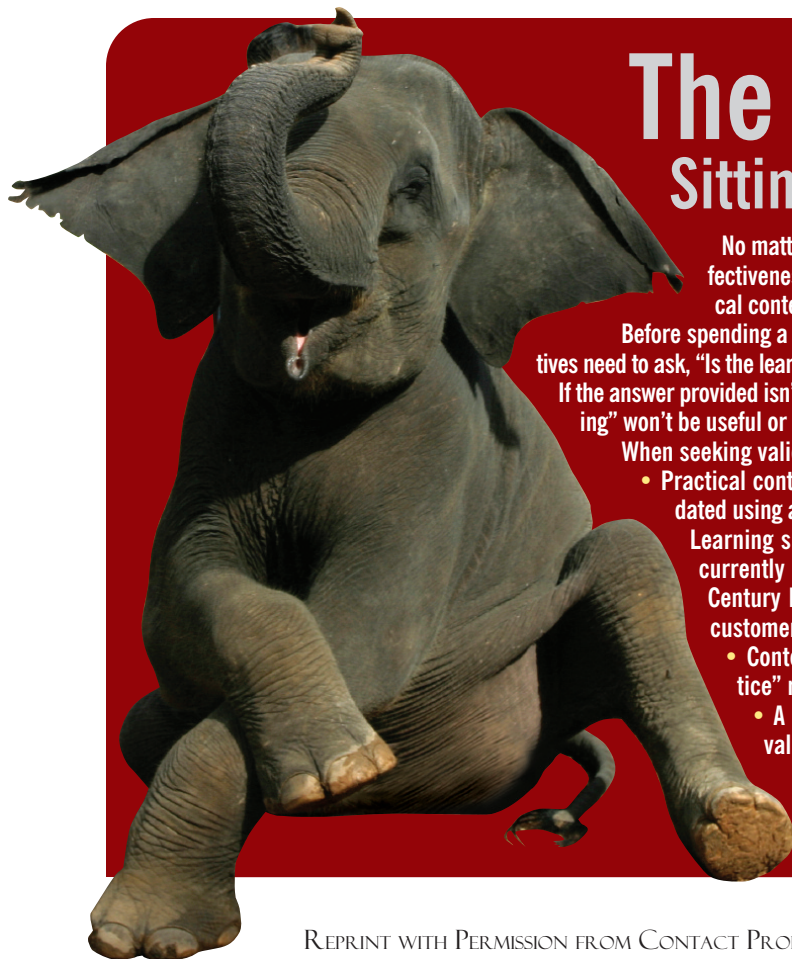
Other contact center executives see its potential in helping agents carve their own career paths and boost their earnings by tying it to compensation. One large center had a need for employees to be proficient in working with different products, operating systems, state laws and customers who speak different languages. The company is currently evaluating a plan to offer employees on-demand

learning opportunities to expand their repertoires by developing skills to service new products or customers in new states, for example. If they demonstrate mastery, they'll be rewarded with additional compensation.

What's becoming increasingly clear is that the use of on-demand learning in the future will evolve in creative ways....many yet to be discovered.

A Final Point to Ponder

So what next steps should senior executives take regarding on-demand learning? First, contact center leaders must recognize that when it comes to learning, there's a tendency to "do what we did." This has to change. Given the present and future trends of our workforce, customer expectations and business demands, we need to continue to look for places where on-demand learning works and be aware of those places that it doesn't. And, above all else, remember that it's only one of many methods to help further develop knowledge and skills that, if done well, can positively impact business results. CP



The Elephant Sitting in the Corner

No matter how on-demand learning is used in our contact centers, its real effectiveness will be gauged by only one determinant – the strength of its practical content.

Before spending a dollar on any on-demand learning application, contact center executives need to ask, "Is the learning content validated and proven to bring about performance results?" If the answer provided isn't definitive, look elsewhere, because the odds are good that the "learning" won't be useful or used.

When seeking validated on-demand learning look for...

- Practical content and behavioral models that are researched, analyzed and validated using a large sample size of real-life interactions. (The simulation-based e-Learning simulations to develop customer service, sales and coaching skills currently used by LaSalle Bank, ABN AMRO Mortgage Group, Intuit and 21st Century Insurance Company have been validated with over 70,000 real-life customer interactions)
- Content that expertly incorporates real-life interactions or "best-practice" research
- A blend of on-demand learning with other methodologies that is also validated through extensive research, client results and ongoing analysis and refinement, and contains the optimum mix of training methodologies proven to develop the targeted skill(s).

About the author: Mark W. Brodsky (mbrodsky@ulysseslearning.com; 704.943.5800), President and CEO of Ulysses Learning, is known for his straight talk and keen insights into simulation-based e-Learning and industry trends affecting organizational profitability and growth. A popular speaker and author, Mr. Brodsky is also highly regarded for his ability to separate fact from fiction and provide fresh, innovative solutions for demonstrable improvement in sales, service and coaching performance. He has managed complex national and global projects to develop service-quality, sales, management and leadership skills for such diverse clients as American Express, Bank of America, DuPont, Environmental Protection Agency, GE Capital International, Tupperware Worldwide and Westinghouse. He currently serves on the Board of Directors of ISA; the professional association for learning providers.

The Ulysses Learning Story...

A Greek shipping magnate who was passionate about training, education and technology wanted to invest in and advance the future of corporate learning. So in 1995 he formed a new company – Ulysses Learning – and, in the spirit of the epic Greek poem, our own “odyssey” began.

The first stop on the journey was to select the best, most experienced senior executives to navigate our course and charge them with a unique mission to search industry wide to:

1. identify the areas of business that could benefit most from developing human performance through technology-enabled training and related services;
2. uncover the toughest barriers to improvement; and
3. assemble a world-class team of experts to develop the best combination of training solutions to achieve and sustain demonstrable performance results.

Thanks to Ulysses’ blue-chip team - top business professionals, thought leaders, and consultants; performance improvement and training experts; cognitive scientists; and industrial/organizational psychologists – we have accomplished this mission.

Our research identified contact centers as an opportune place to begin developing frontline judgment and customer interaction skills. These two critical elements, when developed effectively, improve service, sales and coaching performance and achieve higher levels of revenue and customer loyalty results.

To that end, we developed the **CallMentor®** Learning and Performance Improvement System - simulation-based e-Learning intelligently blended with facilitation, coaching and performance improvement consulting.

Today, **CallMentor** is the contact center industry’s most recognized training solution, winning 10 consecutive Product of the Year Awards, among other industry distinctions and honors.

Ulysses has grown to be an international learning and performance improvement company serving industry leaders committed to improving their sales, service and customer loyalty at all points of customer contact. And, as our “Ulysses” name implies, we continue our journey with our clients to seek and develop the best possible combination of performance improvement methods and processes that produce measurable results and sustain the test of time.



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