25

ONE BRANCHING STORY BUSINESS MODEL

A business model, a business model! My kingdom for a business model!

—With apologies to William Shakespeare.

ULYSSES LEARNING is a tight example of a simulation model. They use simulations as the core of their solution to help call centers, although it is a solution that also brings in facilitation and coaching. Their approach contains many elements that are worth understanding and emulating in other industries and across other simulation types.

Ulysses Learning makes their sales by focusing on improving call centers with their internal processes, such as decreasing the average handle time, and external processes, such as improving the customer experience and resolving their issues in the first call.

Rather than focusing on the hard skills of reps working the equipment, they focus on the broader soft issues of reps and managers. This includes issues like empowerment (in certain defined parameters, the rep needs to be able to make decisions, such as giving the customer a discount, or sending information via overnight mail) and judgment.

RESEARCH

Once a sale is made, the research begins. Ulysses will spend a few days on the client site, interviewing and conducting focus groups with reps, coaches, and managers, listening in on calls, and looking for behaviors that are either working well or failing consistently.

"What is the leverage point?" Mark Brodsky, president and CEO of Ulysses Learning is fond of asking. "Where can we make the biggest impact?"

It is worth noting here that Ulysses has built a modular off-the-shelf library of over a hundred educational simulations of customer calls, in the form of branching stories. These are roughly organized both by verticals (for financial institutions, insurance companies, and telecoms), and horizontals (in-bound sales, in-bound customer service, and coaching).

They do not build simulations for specific clients. Based on their research they will select the right modules from their library and customize certain aspects, for example, putting in the company name, greeting, and selected offerings in the text of their branching stories answers.

It is also worth noting that customers ask them to customize more, something they resist. "It is often unnecessary, especially when justifying the potential incremental benefit versus the additional expense," Mark said. The discipline of pushing back on customers is one that all simulation vendors need to practice.

Once the right simulation elements are chosen, there are at least two other areas that are impacted by client-side research.

The first is the modifications to the experience delivered through people. These can all be relatively easily customized per client and so are tightly mapped to client processes, policies, and procedures.

For slate one (background), the facilitators introduce the program and link the call center's issues to the simulations the people will encounter. For slate three, the facilitators design people-based exercises to augment the computer-based branching stories. They also prepare coaches to monitor calls and provide one-on-one feedback to the individual call center reps.

The other research-based decision relates to whom to include for participation in the initial program pilots. For some call centers it might be new hires, or veterans, or the under-performing, or a combination.

ROLLOUT

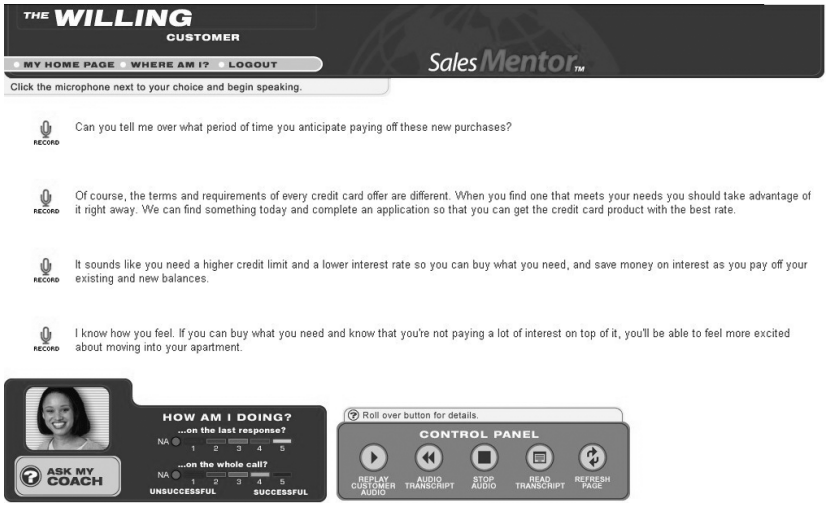
Then comes the rollout. Participants start with a simulation based pretest that tailors how easy or hard the subsequent simulations will be. Mark estimates that about 65 percent fall into a basic path, 30 percent qualify for an advanced path, and, if the organization permits it, about 5 percent test out altogether.

After the slate one background, the participants spend time in parallel engaging a series of simulated calls.

In the simulation, the reps put on headsets. The phone would ring, and their script would come up. After the reps read their script and hit a button, a tape of the customer would play. "You would hear, say, a pissed off customer, and it sounded real," said Ed Arnold, a former implementation consultant with Ulysses. The reps then had a multiple-choice response (Figure 25.1). They then heard the customer reaction and had a meter (a pedagogical element) that would say how well they did with that response, with another meter that reported how well they were doing overall to that point in the call.

"It seemed kind of real, even though you knew it was fake. If reps screwed up, the customer got really mad at them. They would start to

Figure 25.1. Call Center Interface.



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sweat," said Ed. "I would find myself having to say to the students not to take it so personally—that when they hit 'end,' the customer forgets. The simulation does not hold a grudge."

The shorter calls lasted around four minutes. The longest took about fifteen minutes.

One challenge for all classroom-based simulation deployments is that people go through the experience at different rates. To keep people generally on track, the facilitators ask the quicker students to redo simulations, first trying to stabilize their scores (get predictable results), and then to practice extreme behavior to get out of their own comfort zones, even if it means receiving a bad score. This benefits the students by letting them further learn how their decisions impact the customer and how to recover if their calls ever go off path.

Then the facilitators stop the class and engage everybody in group discussion and exercises. "They bring in an emotional component, and it also lets people vent and discuss best practices for overcoming call obstacles," Mark added.

The total time in class is about two or three hours a day over three days, bringing the total to six to nine hours. Most often, the class is spread out over a Monday, Wednesday, and Friday.

Ulysses uses one-on-one coaching in the off days. The coach sits side-by-side, listening to the calls. The coach is trained to listen for the skills. He or she picks the one skill used (or not used) that was the make-or-break of the call, then provides immediate feedback.

At the end of the last class session, students take a final assessment. This is another set of branching stories, but this time without coaching and other pedagogical elements. "Even though we do not encourage the use of the simulations as the primary form of assessment, based on their results in the final simulation," Mark noted, "we can tell with near-100 percent certainty who are going to be the star reps and who is going to drop out for failure to perform. Once the reps learned the model, and once they finished the program, they literally had dozens of examples under their belt. And they knew it. They acted more confidently on the phones."

TRAIN THE TRAINERS

Ulysses' employees always begin with the role of facilitators and coaches, but they wean themselves off that role during the course of the initial deployment. They have a rigorous train-the-trainer program, where the host company's training staff start by participating as reps;

then they coach, then shadow, then co-facilitate; then they do it with Ulysses staff observing; and finally they become certified. "We then certify a master coach to coach the coaches. And we certify master facilitators to coach the facilitators," Mark said.

"We improve the simulations," Mark concluded, "over the course of many client contacts. That keeps them cost-effective for clients, with predictable results."

TRAINERS AS TECHNOLOGY CUSTOMERS

I believe this model is mature, and many other simulation approaches would do well to emulate many aspects of it. But to make this case study complete, I do have to add one more thought from Ed: "The training managers can be the most challenging clients. Typically, they do not take risks. Their biggest motivation is not to get in trouble and not to spend money."

Ed continued, "For the training person, getting them to use technology required, not just hand-holding, but a full intervention. If anything went wrong, like the screen saver came on if they hadn't typed anything in a few minutes, they would call panicked. I would get phone messages like, 'Your program crashed. It is showing all of these weird graphics. What should we do?' My response was, of course, 'Try wiggling the mouse.'"

COMING UP NEXT

Want some proof positive that simulations work? So did I. And here it is.