



CUT YOUR NEW AGENTS' TIME-TO-PROFICIENCY

BY OVER 75%

*This is a case study of a Business Process Outsourcer (BPO) that used ScreenSteps to drastically improve its onboard training.

Before ScreenSteps, newly hired call agents might feel confident handling every type of customer call after **60 days** of being on the job.

But with ScreenSteps, it's more like **15 to 20 days**.

It's the speed to proficiency that's been really impressive. Before ScreenSteps, we could always get agents where they needed to be—it just took a lot longer. After 45 days of being hired, call agents might be proficient for those basic calls, but still might shudder for some of the more involved calls—they just didn't know how to handle them very well.

But with ScreenSteps, new agents don't seem to have any calls that they shudder with. They feel confident handling any type of call within the first 15 days of being hired (even the more involved calls). By day 45 they are pretty much experts.

With ScreenSteps, new call agents are reaching a higher level of proficiency faster than with other training tools and methodologies.

Fifteen new agents recently graduated using ScreenSteps and their performance is the BEST that this call center has seen from any new hire training class in the last year. ScreenSteps was a huge contributing factor.

60 DAYS
WITHOUT
SCREENSTEPS

15-20 DAYS
WITH
SCREENSTEPS

BETTER HANDLE TIME

What does proficient mean?

For this BPO, one metric of proficiency is handle time, which dramatically improved with using ScreenSteps.

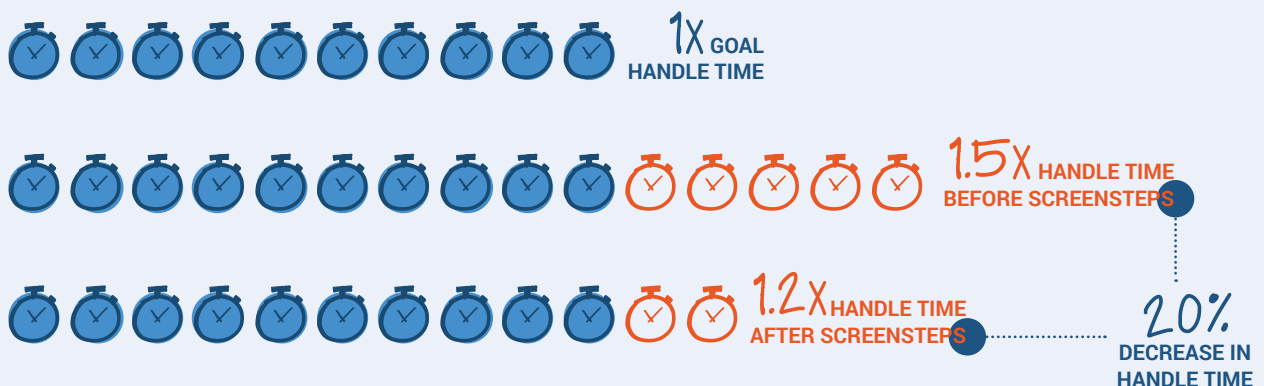
Our training includes 2 weeks of classroom time with 1 week of supervised work on the floor. We expect a new trainee's handle time to be at 150% of the production goal (so they are taking 1.5 x longer than we expect experienced agents) by the end of that 3rd week. Eventually, our goal is to get new hires to be meeting our production goals at 100%. But traditionally, we aim to get new trainees to be at 150% right out of training.

Before ScreenSteps, that was always a huge struggle. We were having a lot of trouble getting new trainees to be at 150% of production handle time before hitting the floor.

But with ScreenSteps, it's not a problem. New trainees have a handle time that is well below 150% after that third week. It's more like 120%—and that's on day one right after training. Within 30 days of being hired, trainees are easily at 100% of our handle time goal.

Not only are new agents more confident they can handle a call, but they actually can handle a call right out of training.

HANDLE TIME DECREASES BY 20% WHEN ONBOARDING WITH SCREENSTEPS



LITTLE TO NO HOLD TIME

One of the big reasons for the drop in handle time is because new trainees don't feel the need to put customers on hold.

We want to keep hold time really, really low. In fact, our tenured agents have almost no hold time. So it's a big deal for us to get new agents to a place where their hold time is really low.

Traditionally, however, hold time is really high for new agents. Before ScreenSteps, we were noticing that a new agents' confidence level wasn't there and they really didn't know what they were doing. What we were finding is that new agents would get on a call, put it on hold, and then ask the person next to them what to do.

But now, we don't see new agents doing that. With ScreenSteps, new agents feel confident and are meeting production hold time right out of the gate. It's been a fantastic experience.

BEFORE SCREENSTEPS

- Answer call
- Put on hold
- Ask neighbor what to do



WITH SCREENSTEPS

Answer call confidently, handle it alone



With ScreenSteps, agents are able to tackle any problem fast. Not only does ScreenSteps have great search functionality so agents can find what they need, but the article formatting makes it easier for agents to respond to customers quickly.

The results show that new hires spend less time putting the customers on hold to find answers. ScreenSteps offers a comprehensive and time efficient system of searching for and finding pertinent info.



DON'T FORGET QUALITY ASSURANCE (QA)

All of this efficiency isn't reducing the effectiveness of the call agents. Since the call flows, policies, and the procedures are documented and easy to follow, high QA scores naturally occur.

QA is our priority. New agents have a high QA score because they stick to all of the questions and procedures in the flows.



So, what did this BPO do to cut the time to proficiency in half? **Changing their approach to training was key.**

TRAINING WITH SCREENSTEPS

This BPO experienced incredible success with ScreenSteps by focusing on three things during training:

- 1 Including a complete call flow
- 2 Formatting articles for easy reading
- 3 Training agents to help themselves

Let's look at these in some more detail.

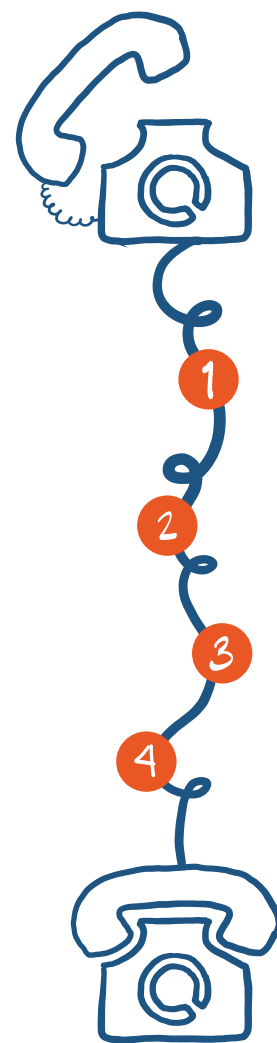
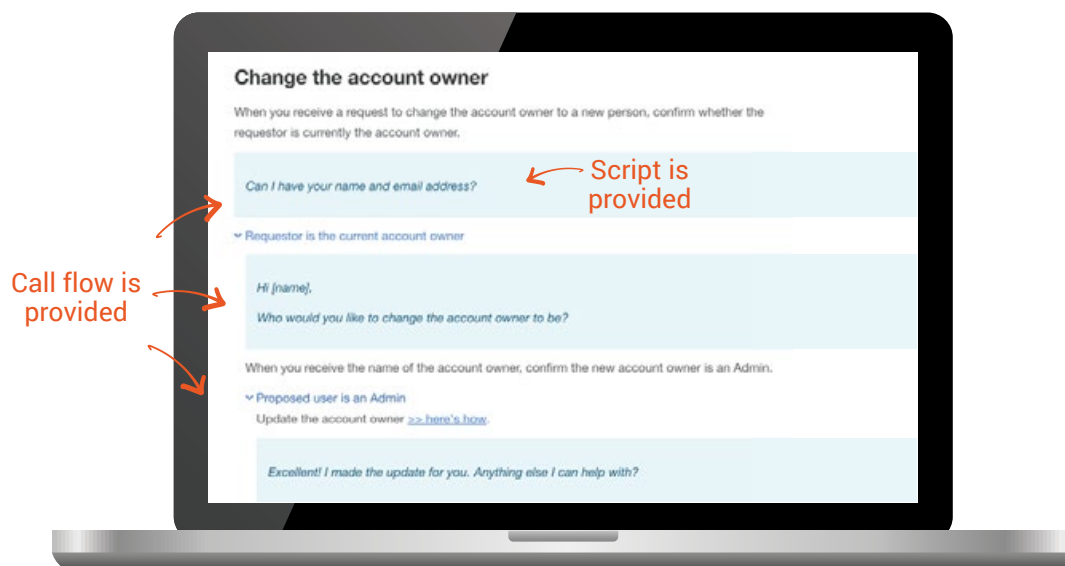
This BPO spent four weeks writing and re-writing its documentation and call flows. But they considered the time spent an investment because it paid off during (and after) training. Having complete call flows was critical for getting new agents up and running.

Here's how this BPO put it:

The call flows really are what has lowered the handle time because they walk you through step-by-step what you should do on any type of call.

You start at the beginning of the call and the call flow goes through the end of the call. Our goal is to have agents find the answer to any call that they get in ScreenSteps. While it's impossible to have 100% of the answers, we have probably about 85% of the calls they could possibly get answered in ScreenSteps. Agents can go in and find out exactly, step-by-step, what to do if they answer a call and initially have no idea.

A good call flow acts as a model that shows new agents what to do and then provides the step-by-step instructions for performing tasks within the system.



THE COMPLETE CALL FLOW

The ScreenSteps system guides agents through an entire call—step by step, from beginning to end.

We eliminate as much guesswork as possible to ensure agents are comfortable and confident.

2

FORMATTING ARTICLES FOR EASY READING

But you can't just throw answers into a knowledge base and expect agents to read them—which is why ScreenSteps includes several formatting options that help improve readability.

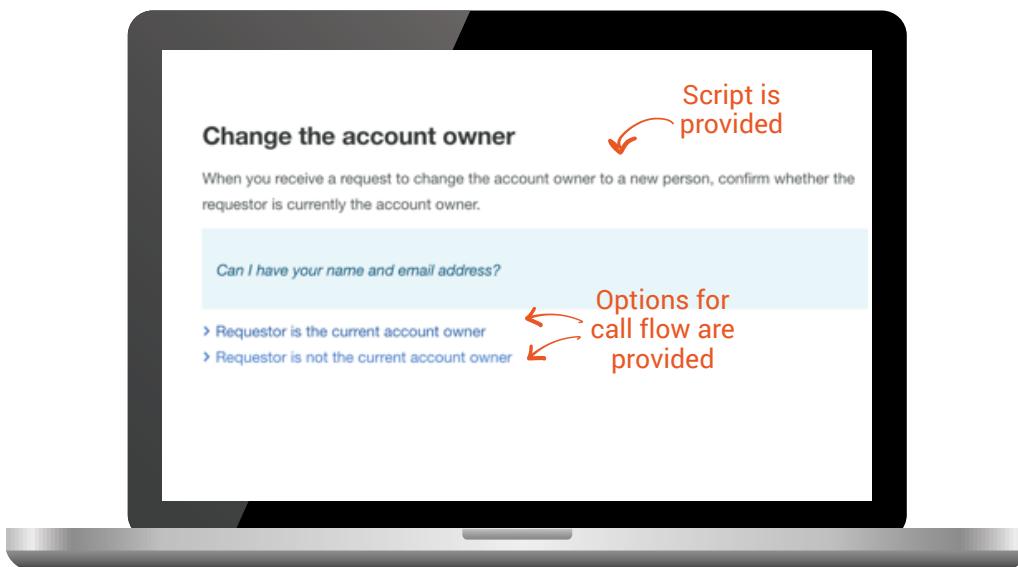
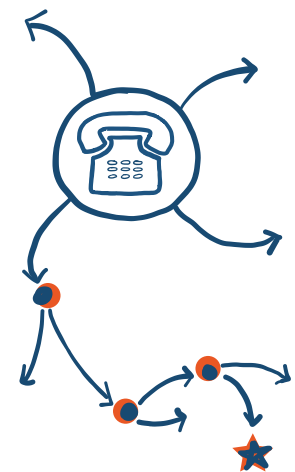
We want agents to be able to skip right to what they need, fast. So our call flows include a lot of foldable sections and inline links, which leaves a very clean looking document that is easy to scan and easy to read.

Since a call might go in 4 different directions, agents need to be able to choose which direction they're going, right from within the ScreenSteps article. So if an agent gets to step 2 and there are 2 options, the agent can click on the option based on what the customer said, and the ScreenSteps article takes the agent right to the applicable steps.

With a minimalist style, agents aren't overwhelmed by a wall of text. Instead, agents gradually drill down to the information they need so they can respond quickly to customer questions and responses.

CALLS CAN GO IN A MILLION DIRECTIONS

So ScreenSteps gives clear options the agent can choose.



3

TRAINING AGENTS TO HELP THEMSELVES

Training isn't just dumping information on new agents or asking them to shadow experienced agents for a couple of weeks hoping something sticks. Our customers teach their agents how to use ScreenSteps to respond to customer questions.

We've always had three-week training. Two weeks in the classroom and one week on the floor monitored. But we were noticing that agents weren't confident coming out of training; they really didn't know what they were doing.

We noticed that after training, agents would get on a call, put it on hold, and then ask the person next to them what to do. We realized that new agents weren't learning anything in class; they learned everything during on-the-job training.

So we've switched our classroom training to feel more like on-the-job training. On day two we teach our agents how to use ScreenSteps. Then from day 3 to day 10, we pepper the agents with real-life scenarios, ask them to find the answer in ScreenSteps, and then we talk about it.

We do a form of nesting in that we start off with easier questions and scenarios, gradually building up to more complicated calls. By the end of classroom training, the agents know how to use ScreenSteps to answer phone calls and can do it with ease.

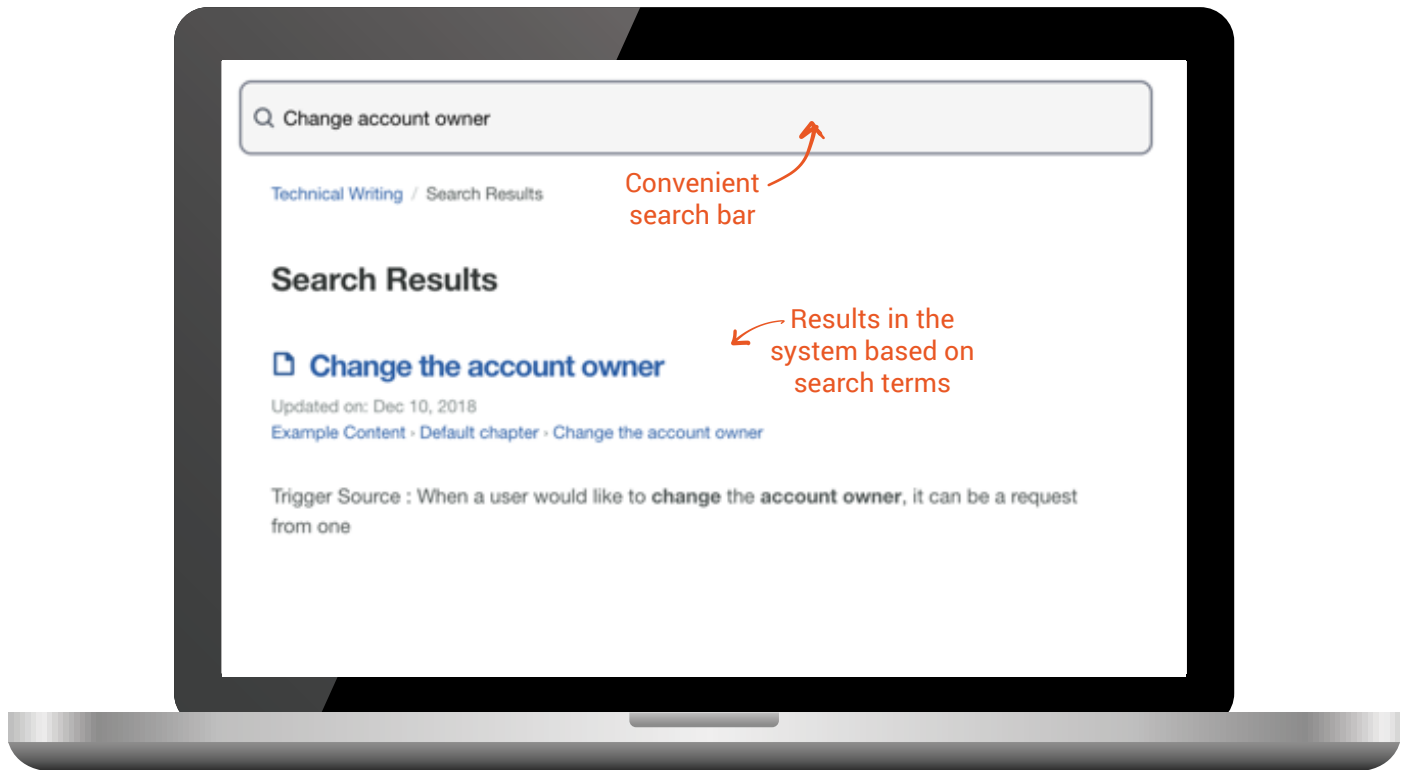
LEARNING IS BUILT GRADUALLY

ScreenSteps doesn't rely on traditional classroom training or memorization—our training is built to emulate the day-to-day on the job.



As training progresses, so does the difficulty of questions and scenarios, building new agents' capabilities and confidence.

During training, the agents aren't being forced to memorize policies or call flows, but rather they are learning how to use the resources in ScreenSteps to respond to customer questions. Over time, as agents re-use the resources over and over again, they may memorize everything and they may not—either way, memorization during training is not the goal.



ScreenSteps makes it easy for agents to find answers via keyword search.

I'm not training agents to memorize anything—I'm anti-memorization. The goal is for new agents to be able to find the answers and use them appropriately. That's what I'm training them to do.

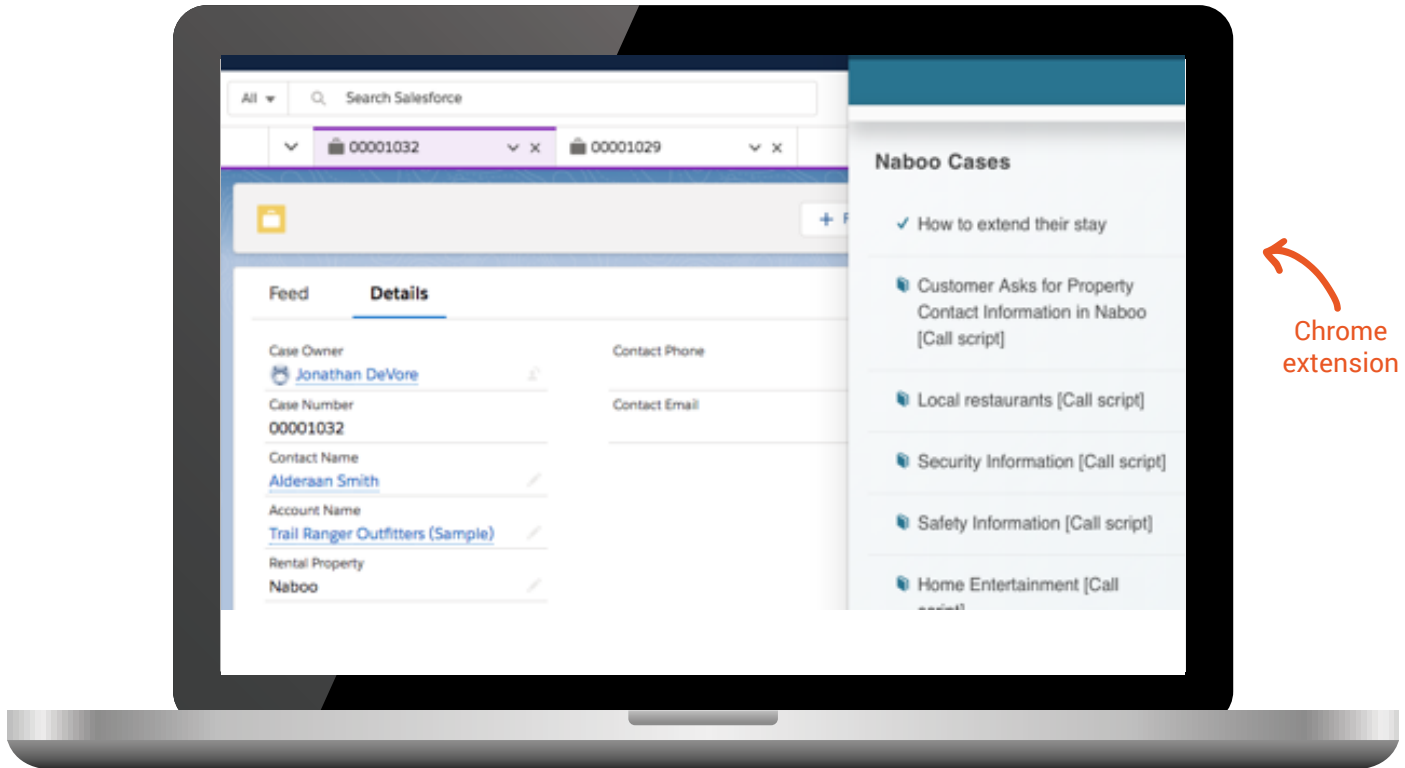
At the end of 10-day classroom training, agents spend 5 days on the floor within arms reach of a manager who can help out if agents get stuck.

After that, the agents are cut loose. But since they have access to answers via the ScreenSteps website, and they've spent 15 days learning how to use it to do their day-to-day jobs, it's not a stressful experience.



THE GOAL

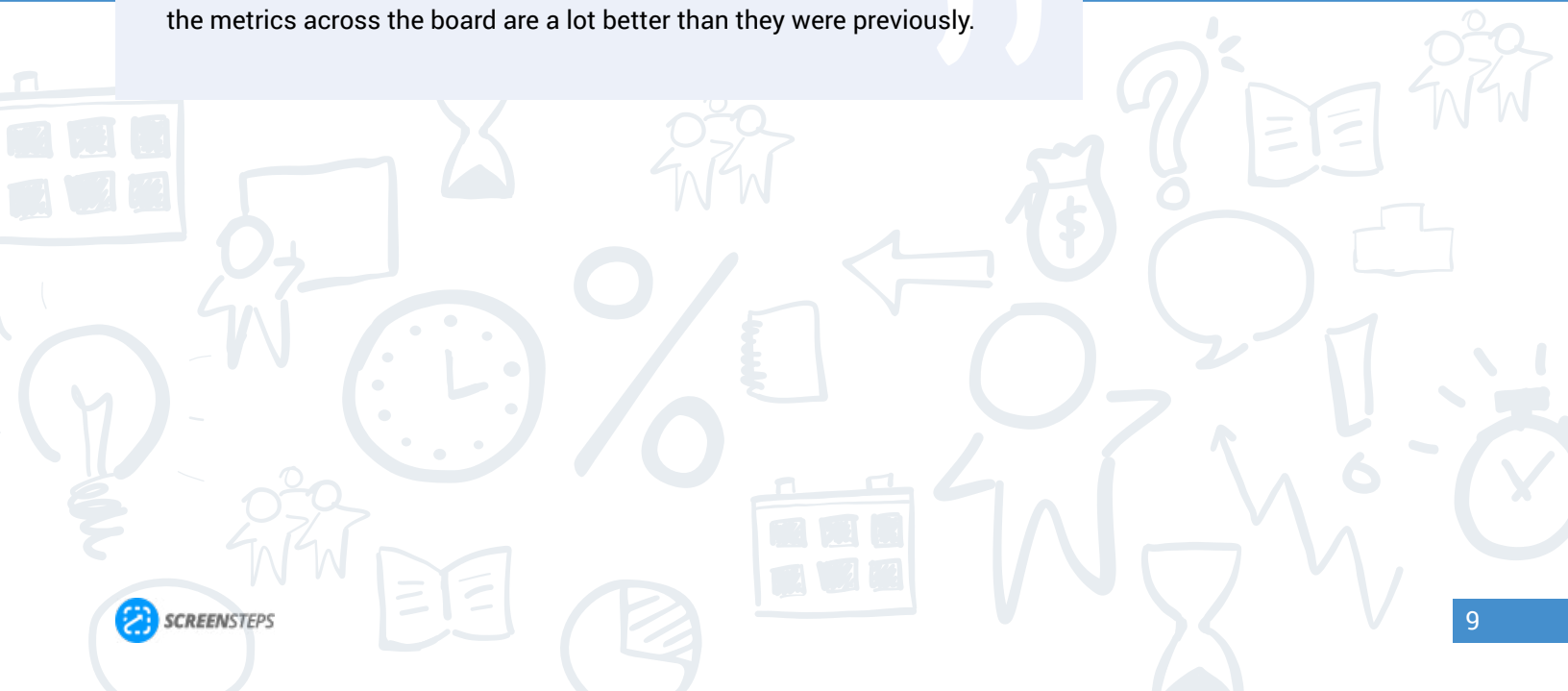
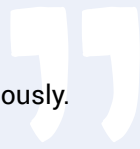
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ScreenSteps also includes a Chrome extension so agents can find answers without having to leave their ticketing system (e.g. Zendesk, Salesforce, NICE inContact).

The metrics show that with ScreenSteps, call agents are doing their job better.

Handle time is down, talk time is down, hold time is down...
the metrics across the board are a lot better than they were previously.



BOTTOM LINE

SCREENSTEPS DELIVERS RESULTS

ScreenSteps will transform how you train agents in your contact center. Not only will your onboard training be more effective and efficient, but it will scale no matter how large your new-hire class is. And if you need to train multiple times a year, ScreenSteps reduces the burden of the trainer.

We probably have 5 training classes a year. We have a facilitator's guide for the training and everything else is in ScreenSteps. If policies change or procedures change, it doesn't really impact the training approach because that's all in ScreenSteps. It's self-contained. We just run through the scenarios and the agents search through ScreenSteps to find the appropriate document.

If you need help implementing ScreenSteps, our consultants can help you map out a strategy and create content so that you can experience similar results in your contact center.

[Click to schedule a demo today!](#)