

What are the typical roles in a call centre?

Within a call centre there are common roles – a Centre Manager, Team Leaders and Agents. There are also other functions such as HR, Trainers or Operational Management resource that play a vital role. The size of the centre will determine the number of Team Leaders and additional support roles.

**Centre Manager:** This is the person who is ultimately responsible for the overall performance and budget of the centre. They will make decisions regarding the people, the process, the technology and the customers that are part of the call centre and the future strategy and development of the centre. The Centre Manager is usually the person who liaises with other departments such as HR and IT, and if it is a sales centre, then typically this will be Sales or Marketing departments.

Depending on the size of the centre, the Centre Manager will have a number of Team Leaders (or Assistant Managers for larger centres) reporting to them. They will be responsible for the recruitment, development and coaching of those who directly report to them.

**Team Leader/Manager/Supervisor:** This is the person who is responsible for managing a team of agents. The Team Leader's role is to ensure individual agents are performing against targets, reviewing their performance and coaching/training them to do so. The Team Leaders will meet on a regular basis with their Manager both to provide feedback but also to receive instructions or actions. The Team Leader is responsible for keeping their agents informed of what is happening in the centre and anything that may impact on the agents. Team Leaders may also get involved in the recruitment of new agents or working on specific projects for the centre.

**Operational Manager:** This is a support role in larger centres. This person will look after the resource planning and estimating; liaise with the Team Leaders and Centre Manager regarding performance management information and is usually the link with the IT department or technology suppliers. Typically this person is good with statistics and is more technically minded!

**Human Resources (HR)** There needs to be a very close relationship between HR and the call centre due to the ongoing people activities such as recruitment and training. Depending on the company, there may be HR resources within the call centre. Usually HR are responsible

for ensuring terms and conditions of employment and job descriptions are all in place, as well as organising recruitment and possibly training for the call centre. They also deal with issues that individuals may have personally or professionally.

**Trainers** Some centres have trainers as part of the overall team because of the high volume of induction and ongoing training that is required. They are responsible for preparing and delivering training to the agents in the centre.

**Coach** In larger centres, in addition to the Team Leader each team may have a team coach who will provide additional support and technical knowledge to the agents. This is usually someone who has been a very good agent and has a good way of getting information over and helping someone to improve their performance.

**Call Centre Agent** The role is to make or take telephone calls on behalf of an organisation in order to fulfil customer requirements. The role can be to sell products or services, provide customer service, undertake customer research or increasingly carry out a debt management function. In a contact centre, where customers use other means than just a telephone to contact an organisation, they may also deal with post or email enquiries.

There are different types of Agent and different skills are required for different roles. Many people assume if you are an Agent you can perform any of the roles, but this is often not true! There are typically Agents who handle inbound calls where customers call into the organisation and the Agent answers these calls. There are also outbound calls, where an Agent maybe calling a customer for market research or to sell them something. Typically the type of person you are may impact which of these roles you might perform. Some centres also have Agents who are blended, i.e. they take both incoming and make outgoing calls.

The other main difference is in the type of call that they may handle – it may be for sales or service or debt management or order taking. There are many different combinations. There is a term used to refer to the likelihood that a customer may buy and this is known as cold calling or warm. If a customer contacts you or asks you to contact them, they are more likely to buy so they are known as a warm lead! If you are calling just to try and sell something to a customer who may not have expressed any previous interest this is called cold lead! The

colder the lead, the harder the telephone call and the more 'sales' skills an Agent will need.

Typically in a call centre Agents who are involved in selling may earn a lower base salary than those who service a client, but they will earn commission, so their overall salary could be much higher if they deliver the results!

What are the skills and competencies that are necessary to play the different types of role in a call centre?

Centre Manager The breadth of skills required of a Centre Manager are wide. They include:

- financial planning and budget management
- people management
- strong communication – verbal, presentational, written
- business analysis
- business management
- relationship management – internal to the organisation and external
- organisational skills
- leadership and motivational skills

Depending on the function of the centre they may also require technical knowledge of the business. For example if in financial services they may need to know the broad legal requirements of the policies; in a sales environment have experience as a sales manager etc. It is becoming more common that a Centre Manager will have worked in different parts of the organisation or with different centres, so they bring a wide range of expertise to the role. The role of a Centre Manager can be highly pressurised, so the ability to work under time constraints and to manage multiple activities is also important.

Team Leader The key skills required for a Team Leader are those associated with leadership – motivator, coach, organiser and a good communicator. It is the Team Leader's responsibility to review performance, provide feedback and coach the Agents that they are responsible for. The Team Leaders need to ensure that the Agents are able to reach the targets set for them and that they develop the necessary skills and competencies. A Team Leader role in a call centre is critical because it is they who will be the main influence on how the individual Agents in their team perform and therefore how overall the

centre achieves its targets. Each individual performance is combined to achieve the overall centre performance, so where several individuals may not be achieving their performance target, then this will have an impact on the overall centre.

Many centres appoint good experienced Agents to Team Leader roles, but past experience may not always prepare the Team Leader for their new role as they may not have the leadership skills required to manage and motivate others around them. A Call Centre Team Leader also needs to be able to juggle many different tasks and to work in what is often a challenging environment. The role itself can be very rewarding, and is also a stepping stone towards other positions.

HR Role Normally within a centre, if there is an HR function, the individual will have completed the Institute of Personnel Managers course (or something similar). They will need to have strong technical knowledge around the legal aspects of employment and the company policy and procedures. There may also be administrative roles linked to the HR function to handle recruitments and day to day administration.

Operational Management roles Individuals performing these roles usually have an interest in working with figures and technology. Most of the job involves planning, scheduling, forecasting and reviewing performance within the centre and they do this by analysing the management information produced. This role also involves monitoring, maintaining and updating elements of the technology in the centre. The skills that are required are good analytical capability, attention to detail, ability to work with management information and also report writing.

Agent No matter what the industry or specific agent role, the Agent will all have some common skills.

These skills will include:

- Good proficiency and navigation skills around a PC - also now including the internet
- Excellent keyboard skills - as they usually have to input data into a system
- Good telephone manner with a clear speaking voice - as most of their work will be done over the telephone
- Good communication skills and the ability to build rapport with the customer

- Ability to work well in a team

Therefore if you are applying for a job as an Agent, there are usually a set of tests based on the above skills that a successful candidate must demonstrate before being offered the job. The reason that these are important is that they all help to make the agent more readily able to handle large volumes of telephone calls as effectively as possible. If an agent does not have these skills, then the organisation would have to spend additional time and money to help the Agent to develop these skills and the organisation may not be willing to do so.

For specific roles additional skills will be required, these could include:

- Sales agent – the ability to sell the product or service to the customer and the confidence to do so
- Service agent – good customer relation skills and empathy
- Debt management agent – negotiation skills.

It is important to note that not everyone will have the skill or desire to do either the sales or debt management roles but often those agents also do the customer service role. It may seem surprising but some people will really enjoy the buzz they get from making a sale but others don't enjoy doing this. In terms of salary, a sales or debt management agent may earn a lower basic salary but with commission linked to revenue generation they may earn more overall than a service agent. In more and more centres, even service agents are expected to cross or up-sell products to existing customers. Cross sell is where they sell an additional related product for example - travel insurance to someone booking a holiday or up sell to a more expensive product.

Any of the above roles can either be for inbound calls or outbound calls. Again some agents find making outbound calls very difficult. Some organisations combine both inbound and outbound calling and this is known as blended calling. It means that during quieter periods of the day more calls may be made outbound than inbound and vice versa. If applying for a role in a call centre, you may want to know for what purpose the role is.

Why are these skills so important to an Agent?

Many centres are driven by cost whether we like it or not and a key factor in cost is that of the people in the centre. Typically people account for around 70% of the operating cost in a centre.

In very simple terms if an Agent can handle 100 calls per average working day and the centre receives 10,000 calls per day then you would expect the centre to need around 100 agents to handle these calls! (More about this later). If, however, the Agent either handles less or more calls, then the number of Agents required either rises or falls and so the cost of operation will also rise or fall!

One of the key measures in determining the number of calls an Agent can handle is known as the average call duration or average handling time. For the purposes of this section, the average call duration includes both the talk time (the time the Agent spends actively talking to a customer on the phone) and the wrap time (the time after a call has completed that an Agent requires to complete any admin work). If the average call duration goes up, then they will be able to handle fewer calls in a day or vice versa. For an Agent to handle a call as efficiently as possible they must be competent at navigating around their system, keying information in etc. Hence, all Agents being recruited for a call centre should have as a very minimum requirement the key skills of typing and computer navigation.

To finish this section – it is not enough to handle calls efficiently – many centres focus too much on the average call duration as a key metric, but also how effectively the Agent has handled the call! Effectively is defined for these purposes as getting it right first time, good customer service, expectation setting, completing promises etc so that the customer does not have to come back again to repeat their request! Therefore to ensure an Agent is effective – they must also be competent in the technical knowledge of product and process, appropriate customer service skills, and depending on the nature of their role either sales or debt management or customer service skills.

So if you are thinking about working in a call centre, you can really help yourself by improving your keyboard and pc skills as a starter!