

Five Steps to Building a Skill and Knowledge Profile for Your Support Center

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Do you know the skills your staff must possess to meet your customer service expectations? Do you know what training each member of your staff requires to meet and exceed customer service expectations? If you do, you're the exception. What many support managers have is an anecdotal sense of what is needed, based on their experience. Few managers have taken the time to develop a skill and knowledge profile for the positions in their organization. This article will outline the steps required to define a skill and knowledge profile for your call center.

Understanding the skills and knowledge required for each position in the support center is key to delivering consistent service to customers. Especially in today's job market where staff move freely and take their training and experience with them. Customers don't want to call in the first place, but they want predictable high quality support from whomever responds to their request, either over the phone or electronically.

In addition to delivering consistent service levels to customers, a skill profile can benefit support managers in three other important areas. First, by understanding the skills and knowledge necessary for each position in support, filling vacated positions with the right staff, either internally or externally, becomes much easier. Second, a skill profile provides support managers with the basis for defining the training and certification programs required to develop current staff, so they can meet current and future customer demands. Finally, a skill profile will communicate to the staff the objective requirements necessary to advance within the organization. Let's look at the five steps required to define your support center's skill and knowledge profile.

Step 1: Define Skills within Categories: You can't just start making a list of skills; it would be endless and unstructured. We need a structure to define skill within. For support organizations, the following list of categories captures the types of skills necessary to deliver quality support:

Customer Service – The skills required to provide excellent service to customers in all situations. This would include problem solving skills as well as the soft skills of support (e.g. handling angry customers, setting customer expectation, listening, negotiation, telling the truth and other soft skills).

Domain – Knowledge or skills, in a specific industry or process, that is necessary to support a product. In many support centers the staff must possess a certain skill and knowledge level in a particular industry or process (e.g. accounting, off-set printing, photography, etc.) to be qualified to deliver product support.

Application/Product – Skills at operating a specific product or set of products that meet a customer's service need. This could be MS Word, SAP or Photoshop.

Technical/Environmental – Includes technical skills, hardware environment, Unix, Windows, networking, the Internet or any product-specific environmental skills. Included in this category would be product integration skills such as understanding file formats, compression routines and hardware cabling and connectivity.

Administrative – Skills and knowledge of how to use the tools and processes of delivering services to customers. This would include skills in the use of the call tracking system, knowledge system, support web site and other tools used to deliver support. On the process side, it includes both the support processes such as knowing and understanding the support delivery, knowledge management and escalation processes of the support center, and the personal administrative processes such as time management and team building. For support leaders this would include the managerial processes such as performance appraisal development, career development, coaching and team building skills.

The mix and importance of the skills in these categories will vary, based on the types of products and customers being supported. In support centers providing desktop and hardware support, technical and administrative skills are more important than domain knowledge. The customer expects the support representative to be expert in their desktop hardware and software tools. But in support centers that provide accounting or engineering application support, domain knowledge is critical to meeting customer expectations. An accountant or engineer expects the support person to understand what they are trying to accomplish with the application, so domain knowledge in accounting or engineering is required to meet the customers' expectations.

Customer service and administrative skills are critical for all call centers. We frequently forget that these skills are the most commonly used skills in a support environment. Every customer interaction, whether it's face-to-face, phone or electronic, involves the use of these skills. Many would argue as well that these same skills are used in all communications within the call center. Providing poor customer service cannot easily be overcome simply by providing an excellent technical solution. So customer service skills should be an important part of any skills assessment, training and attainment process. Likewise, administrative skills are needed to properly document calls, share knowledge within the center and work as a team. We find that these skills are frequently overlooked, or pushed to a lower priority in favor of application and technical skills, but they are in fact the most critical to maintaining customer satisfaction over the long term.

Now that we have defined a set of skill categories to capture the skills, let's look at how to grade the skills by level with a ranking system.

Step 2: Set up a Skill Level Ranking Scale: Before you get started defining the skills, you will need to develop a ranking method to indicate the varying levels of attainment. This can be as simple as no skill, trainee, novice and expert, each with a short definition. When defining a skill, each level of attainment on your ranking scale should be clearly defined. Keep the ranking levels to a maximum of four levels, including 'no skill'. The fewer the number of levels, the easier the skill definitions will be to complete.

The ranking levels are critical to delineating the skills across the various roles within the organization. For example, while a call screener may only require a trainee level in problem solving while a senior analyst may be required to be an expert, the screener may require expert skills in phone usage.

Now that we have the categories and ranking system, we can move on to defining the specific skills in each category.

Step 3: Define the Specific Skills for Your Center: To effectively complete this step, you will need teams to identify and define the skills required at your support center. Dividing the teams by skill category is the easiest way to assign the work. You will find that separating the teams this way also facilitates team assignments. You should allow your staff with the strongest skills in a particular area to work on the team defining those skills for the entire center. For example, your staff who are best at technical issues should work on the technical skills team.

Defining a skill profile for every position in the support organization is a daunting task. Attention first needs to be focused on the core delivery roles within the organization, and then move on to the other roles. Focus especially on those roles that deal directly with the customer or have a high attrition rate.

You'll find it easier to have the teams delineate the skills by level and position during this step. The best approach is to brainstorm the list of skills first then assign team members to define each skill in some detail. Once this is completed have the team return to brainstorm the levels by role in the organization.

By using the team approach to defining the skill profile you not only complete sooner, you get more complete skill definitions and buy-in to the process across the organization.

Step 4: Rate the Skills within each Role of the Organization: Now that the skills are defined in detail and ranked by role within support, we need to rate the skills as to their importance within a role. The rating could be as simple as 'required or desirable', or could be a weighted index used to develop a score based on an assessment of

individual's skills. No matter how this is accomplished, there needs to be a method to rate the importance of skills in successfully completing each role.

When a staff member is presented for advancement it is important to know which skills are critical for success in their new role in the organization. In reality, not everyone who is 'available' for advancement will have a full complement of skills. The skill rating provides a basis for judging these skill shortfalls, based on their value to the position. It also provides a consistent basis for advancement and clearly defines the skills or experience that must be developed prior to advancement.

At this point the profile is complete. All the skills are defined and ranked by role. For each of the roles in the organization the skills are rated as to importance. Now, to finalize the profile, it needs to be benchmarked against a sample of the current staff.

Step 5: Benchmark the Profile with Current Staff: Benchmarking the profile against current staff will aid in validating the profile and allow for some final adjustments in ranking and rating the skills by role. To accomplish this, pick one or two staff members from each role and have them do a self-assessment of their skills. The selected staff should be good performers in their current role but not necessarily the best. Also have their direct leader complete the skill assessment and meet them to discuss the differences and skill list. Once this is completed, have all the participants meet to provide feedback to skills teams and make any final adjustments to the skills, rankings and ratings. Frequently, at this point, some skills may be consolidated and the number of rankings reduced.

The Next Steps: To have a successful support organization over the long term, you need to find, train and retain the right people within your organization. This starts with knowing the skill profiles of the key positions within your support center. It is not an easy process to complete. But when completed, this information is the basis for hiring new staff, developing training programs and communicating job requirements to the staff. Support organizations can maintain high levels of customer satisfaction for long periods when they are staffed with consistent skill levels.

Now that the skill profiles are complete, the next step is to build the skill attainment and certification programs to develop the skills within the organization.

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