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How to Find and Hire Stellar Customer Service Representatives

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Introduction

This whitepaper provides insight and techniques to help you find – and hire – stellar customer service representatives. It offers practical advice on how to weed through the blizzard of resumes you're likely to get and avoid potential hiring mistakes that can cost you and your firm.

H ow often have you heard, "A company's most important resource is its people?" A recent survey by Accenture backs this claim, revealing that a majority of high-ranking executives say a key focus is in finding and keeping talented workers. Peter Cheese, global managing partner of the firm's human performance practice, says, "The most powerful theme emerging this year is a strong and consistent focus on people."

This is especially true when it comes to Customer Service Representatives (CSRs). Consider the impact they have. Your customers are the ones paying the bills, so how they are treated translates directly to the bottom line. Who has more direct contact with your customers on a regular basis than CSRs? They are vital to the strength of your company, so how do you find and hire top performers? In this whitepaper, we will show you how.

Cost of the Wrong Hire

By one study, as many as one in three employees is in the wrong job. Imagine if you had to replace one-third of your CSRs. While it is unlikely your turnover is that high, it is probably greater than you would like and the cost of replacing employees is high.

Consider the "hard" costs:

- Severance pay and outplacement assistance
- Advertising the position on job boards and newspapers
- Recruiting fees
- Paying a contractor to fill in while the search goes on
- Training the permanent replacement

"Soft" costs include:

- Extra work for the remaining team members
- Lower team morale
- Negative impact on the customer
- Loss of institutional memory and intellectual property
- Management and Human Resources time spent searching for a replacement
- Opportunity cost of not doing something else

These reasons alone argue for hiring the right person initially.

The Right Hiring Practices

You can insure you have the right people working as CSRs by developing solid hiring practices. These include:

Defining the job correctly. Too often, the position description is inadequate or inaccurate. We will discuss a seldom-used but powerful technique for capturing a precise job description.

Winnowing resumes. At least 80% of firms today use the Internet to advertise jobs. While this is a cost-effective way of publishing openings, it can result in a blizzard of resumes, many of which are from unsuitable candidates. We will present a

simple technique for quickly determining the most qualified and motivated candidates.

Interviewing effectively. When was the last time you, as a hiring manager, received formal training in interviewing? Probably never, unless you work for an enlightened company. Most managers learn by doing, which may work for some managers, but often fails to equip them with the skills required to elicit the answers they need to make an informed decision. We will offer techniques to identify the best fit candidates, using both telephone screening and in-person interviews.

Checking references. Checking references is often a perfunctory exercise, performed after a decision to hire has been made, but before a job offer is extended. We will discuss why moving the reference check earlier in the hiring process can be useful as an adjunct to interviewing to gather information about candidates.

Deciding on the right candidate. Of all the skills and traits you have identified in the job description, how do you decide which ones are absolutely crucial that a CSR possess on Day One of the job, and which you can train? Of the constellation of skills, attitudes, and aptitudes candidates present, how can you identify which ones are most closely associated with exemplary employees? We will show you how to make these choices.

By the end of this whitepaper, you will have the tools necessary to move beyond hiring merely adequate CSRs to identifying truly stellar Customer Support Representatives.

The Hiring Process

The first step in hiring stellar CSRs is knowing what to look for. This sounds obvious, but how do you know what makes up a superior performer?

Job Description

Most managers start with the job description, but where does that come from? Rather than creating one from scratch, managers often take the easy way out, obtaining one from the Human Resources department or using one left in the pile from the previous manager. Sometimes, it comes off the Internet, where a manager does a search of similar jobs and copies one that looks appropriate or puts out a request to a listserv for examples to use. All of these approaches can help you get ideas, but it is no substitute for the careful thought necessary to define what is needed for your job at this moment in your department's circumstances.

What skills do CSRs need? Not all skills are equal. Some are absolutely required while others are merely desirable. For example, CSRs communicate with customers most often via telephone, email, and chat. Strong verbal and written skills are essential to making a good impression on the customer and effectively capturing information, so make them a requirement. On the other hand, if 90% of the questions deal with how to use a software product written in VB script and only 10% deal with defects where the knowledge of software programming is helpful, don't require VB script; list it as desirable. This sounds like common sense, but how often have you seen an advertised position with a long list of requirements, all of which you know cannot be absolutely necessary. Excellent candidates may self-select themselves out of applying if they feel they do not meet all the requirements. Explicitly differentiate between required and desired skills.

A list of skills needed to perform the job is only the least common denominator, the minimum necessary to do an adequate job. You do not want merely adequate performers; you want exceptional talent. After all, how can you provide exceptional service with average talent? To identify characteristics of stellar performers, use a "success profile." An easy and effective way to create a success profile is to have your CSRs think of one or two of their colleagues who perform exceptionally well, then without naming them have them write down the attributes and characteristics that make them stand out. As a manager, you can do this too, in a slightly different way. Think of the average performers in your group and consider what they need to do to move into the exceptional category. In fact, you may have already done this during performance reviews. Take your list and the lists from your staff and analyze it for clusters of attributes common to the star performers. Now you have a success profile for stellar CSRs. Incorporate it into your job description and you have increased your chances of pulling in resumes from exceptional candidates.

Finding the Needle in a Haystack

Once you have advertised the position, be prepared for an avalanche of resumes, especially if you post to well-known national electronic job boards. At first blush this can be encouraging because you think, "Wow, look at all the qualified candidates I have to choose from!" This assumes that all who reply have read the ad carefully, considered the qualifications you have so meticulously listed, and have found they match up well. Unfortunately, this is not the case. The reality is that a large percentage of replies will be sent by people who are not even close to what you need, because the ease of replying electronically invites potential candidates to fire off a resume even if they are only remotely qualified. How can you quickly and easily separate the wheat from the chaff? Try this technique.

Have candidates reply via a web site, where they not only include their resume but reply to on-line questions. Each question represents one of the major qualifications and asks them to describe in detail how their background and experience matches the advertised requirement. If you do not have the technology for this, accomplish the same thing by either asking candidates to include a cover letter answering the same questions or responding to their original resume submission with an email listing the questions and asking them to reply with answers.

Doing this serves three purposes:

- If you consider only those who follow these instructions, you have cut down on the resumes to screen.

- It insures only motivated candidates apply, because it requires extra effort beyond blindly firing off a resume.

- It provides a convenient way of zeroing in on candidates' strengths relative to your job needs, without your having to pick through each resume to divine how well each matches your qualifications.

The Interviewing Process

In this section, we discussed how to develop an effective job description that targets the characteristics of top performing CSRs and how to cull resumes in order to find good candidates. In this section, we outline how to screen and interview effectively.

Telephone Screening

Once you have identified solid potential candidates by reading their answers to your targeted questions and by reviewing their resumes, follow up with a telephone interview. Do not push this task off on Human Resources. It is crucial that you make this telephone contact yourself. The chances are high your CSRs will be dealing with customers via the telephone and it is critical that they present well on the phone. You are the best person to judge this.

Prepare by having a standard set of questions ready to ask. Since this is your first direct contact, a good way to put candidates at ease is to ask questions that confirm items on the resume that relate to the job requirements. Keep the list short enough so the conversation lasts no more than 20 minutes because the phone screen is as much about how candidates sound as it is about what they say. Listen for their choice of words, their grammar, their energy and enthusiasm. Picture yourself as a customer and ask yourself, "Does this sound like someone I have confidence in solving my problem?" If you like what you hear, the next step is the in-person interview.

In-person Interview

There is an adage in human resources that at the point where you invite candidates to an in-person interview, you have already decided they can do the job. After all, you have reviewed their resumes and talked with them on the telephone, so you know they meet the minimum qualifications. What you are looking for in the interview is how well they can do the job and how well they will fit the culture of your organization. Remember, you are looking for superior performers, not merely adequate fill-ins. What questions do you ask and how do you ask them to get satisfactory answers?

As with the telephone interview, have a standard set of questions for all candidates. Target your questions at the required and desired skills from the job description, the attributes you uncovered in the success profile, and way your company does work, its culture. The most effective technique is to craft behavioral questions. There is a basic psychological principle that the best predictor of future behavior is past behavior. Behavioral interviewing elicits from candidates their past behavior in the form of PARs: Problems, Actions, and Results. You are looking for the problems they faced, the actions they took, and the results they achieved. Typical behavioral questions begin with "Tell me about a time when ..." or "Give me an example of ..." Savvy interviewees know how powerful PAR stories are in conveying their qualifications, but more often you will encounter interviewees who are not familiar with the technique so you will need to help them along. For example, if your CSRs have to deal with disgruntled customers on a regular basis, ask "Tell me about a time when a customer called and gave you a hard time. What did they complain about, what did you do, and how did it turn out?" Just this one question can tell you about their product/service knowledge, initiative, follow-through, interaction style, and emotional maturity.

Be careful of "Should" or "Would" questions, which at first blush appear to be behavioral questions. For example, notice the subtle difference between "Give me an example of ..." and "What would you do if ..." The former asks for previous experience, a behavioral question, while the latter is a hypothetical question, which can be answered by what the candidate thinks you want to hear rather than what he might actually do. Beware of other types of ineffective questions, like leading

questions (e.g. "You are a good team player, right?") and questions that can be simply answered "Yes" or "No."

A vast amount of information is conveyed via non-verbal cues. Tune in to facial expressions, eye contact, tone of voice, body posture and motions. All of these are keys to personality and style and add to the total picture of the candidate.

So much of a CSR's responsibilities involves written communication, such as emailing customers, logging cases and escalating them, and authoring FAQs; well-developed written communicate skills are essential. You need to get a sample of the candidates' writing. Ask them to bring it in with them to the interview or have them email it to you after the interview. The closer the writing sample is to the subject matter they will be dealing with the better, but any sample that illustrates their ability to convey concepts clearly and concisely using proper grammar and punctuation will do.

If your CSRs do training, you will also want to see a sample presentation. This should be short, no more than 15-20 minutes, because this is all you need to judge their comfort speaking before others and their ability to articulate a concept, perhaps using visuals. Give them sufficient time to prepare and as with the writing sample the subject matter is not as important as how well they perform.

Standardized Tests

It is increasingly common to administer standardized tests to job candidates. They can be useful adjuncts to other data gathering techniques, but they need to be kept in proper context. Ask these questions:

- Have the tests been psychometrically validated by a reliable vendor?

- What information will be gained that is not available via other techniques?

- How will the information be used in the decision process and how much weight will the results be given?

- Most importantly, how well do test results correlate with job performance?

Checking References

Who checks references and when should they be done? Companies often have a policy stating that "the job offer is contingent on satisfactory references." This means that essentially the hiring manager has already decided to offer the position to a candidate and that reference checks are done after that. They are often done by the Human Resources department, not the hiring manager. Resist these temptations.

Check references yourself. You know the candidate best, so you are the best judge of what references are telling you. Have two sets of questions, a standard set you ask all references for each candidate, and a different set, specific to each candidate and developed as you are interviewing.

Check references after you have interviewed the top candidates, but before you have made a hiring decision. If you check references after you have decided on the candidate, you have already committed in your mind that this is the best person for the job. After all the work you have done to this point, how open are you going to be to evidence disconfirming the candidate's strong points? How much energy are you going to put into probing for weaknesses? Instead, human nature suggests you are likely to "hear" only the good news and discount the bad. Rather than being dispassionate about your decision, your desire to "get this over with" can cloud your

decision-making. Of course it is more work to check references on three candidates than one, but in the long run it is less work than repeating the entire hiring process because you made a bad hiring decision.

References are an excellent target for behavioral interviewing, because they have seen candidates in action. Ask for examples of how they handled certain situations and get estimates of their skill level. Don't forget to find out about the candidate's job habits. You are better off knowing someone spreads malicious gossip, is constantly late, and yaks incessantly on a personal cell phone before you hire someone than afterwards.

Look for what is not said. If a particular skill is absolutely essential, the candidate has convinced you he has it, but the reference does not mention it, find out why. If, in reviewing work history, there is a job from which you would logically expect to see a reference but the candidate does not provide one, it could be a red flag.

Hire for Attitude, Train for Skills

After all the work you have put in to get to the point of deciding who to hire, the truth is that you will not have found the perfect candidate. Each will be lacking something and the key is to know which skills, attributes, and experience the employee must have Day One, which you can get along without, and which you need but the candidate can learn.

CSRs must have a customer service orientation, which is a personality attribute they either have or they don't. Trying to train someone who is not customer-focused is an uphill battle at best, so look for people who have it; don't think you can develop it. Likewise, we have stressed the need for good written and verbal communication skills in dealing with customers. These skills are developed over a number of years and if the prospective employee does not bring these to the job initially, even with training they are not going to develop them quickly or competently enough to make a difference.

It is unlikely you will find CSRs with specific job knowledge, such as how to use your CRM and ACD systems and what your procedures are for getting work done, like escalating issues and communicating with other departments. You will have to train them. What about subject matter or domain expertise? How much of that you require depends on how quickly you need new CSRs to be productive and how technical or subject-specific the customer queries are likely to be. In the long run, it is less important what CSRs know prior to getting hired than how quickly they can learn new things. Look for an aptitude to pick up skills you need. Even if prospective employees arrive with technical and domain-specific skills, the pace of change has accelerated so quickly that what employees know now may not be relevant in the future. New products and services are released, existing products are changed, and new procedures are introduced. CSRs are directly affected by these changes. Great performers embrace change and learn quickly; mediocre performers are threatened by it and are reluctant to let go.

In short, if there are two factors that differentiate great CSRs from the rest of the pack, they are attitude and aptitude. Look for passion, energy, enthusiasm, and adaptability. Concentrate less on the specific job-related skills prospective employees bring to the job but focus more on their ability to add to their skill set quickly.

Conclusion

You do not have to settle for a mediocre candidate – nor should you. This can be difficult when you think you need someone immediately. While it is painful not having someone in place, consider how long and painful it is to terminate someone, then go through the entire hiring process again. Mediocre talent produces mediocre results. If you follow the process we have outlined in this series, you will find stellar CSRs who will dazzle your customers and enhance your company's prospects.

About Customer Centricity, Inc.

Customer Centricity, Inc., is a business consulting firm that works with companies to align their resources to exceed customer expectations in the most efficient and effective manner possible. We leverage our real-world experience to help our clients continuously improve their service delivery and management capabilities to:

- Increase profitability

- Improve customer satisfaction and retention

- Increase operational efficiencies

- Improve employee satisfaction

Customer Centricity optimizes the interaction between people, process and technology in several ways:

- Comprehensive assessment methodology to identify the actions that will yield our clients the greatest return

- Skills Training to enable customer-facing personnel to deliver exceptional levels of customer service

- Design and Implementation of business processes to serve the customer and manage corporate resources in efficient, effective and consistent manners

- Identification of the appropriate business processes to automate, enabling companies to get the most from their investments in technology

Customer Centricity's approach is to work closely with our clients to help them understand what they are doing right, and their opportunities for improvement. We provide pragmatic recommendations that provide immediate benefits, and we drive continuous improvement programs to help our clients realize significant return on investment in a very short period of time (measured in weeks, not months or years).

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