18 Pitfalls to Avoid When Scaling Your Call Center or Customer Service Team

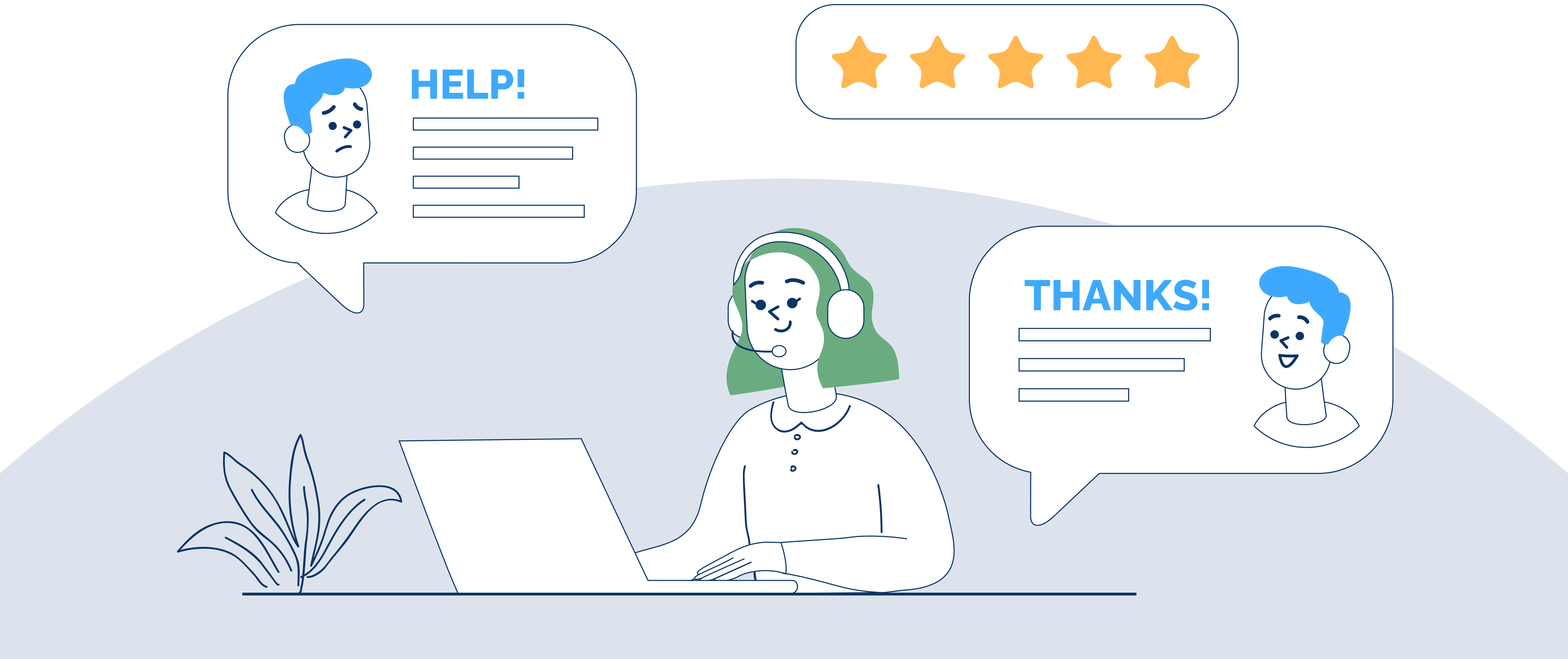


Table of Contents

SCREENSTEPS

Table of Contents

SCREENSTEPS

Let's tackle the 18 pitfalls

Running a call center takes a lot of coordination and planning. It is challenging to keep operations running smoothly and stay on top of everything — especially when your call center is growing.

While it's exciting that your call center is growing, the added pressure that comes with the growth can be overwhelming. Wouldn't it be nice if you could anticipate some of the challenges you would face when scaling your call center?

This eBook is your crystal ball into 18 potential pitfalls that you could face (or are maybe already facing) when scaling your call center.

Smaller call centers can get away with a few documented procedures, ad-hoc training, and informal hiring processes, but that might not translate well as your call center grows and you double your call center staff.

What follows in this eBook are warning signs that your call center may struggle as you add more call center reps (aka proceed with caution if you recognize any of these pitfalls in your call center).

Luckily, for each pitfall, there are **a few solutions so that you can prepare — and, hopefully, avoid — some of these challenges.**

Pitfall 1

Having documents scattered in different places

Maybe you have some printed documents, but then you also have documents saved in a desktop folder and the cloud. If you have documentation but it is stored in different locations, then your **reps won't know where to go to find the guide they need.**

Since it is too difficult to find your guides, your reps won't use them. Instead, they rely on tribal knowledge — concepts and strategies passed between agents and trainers — which often **leads to mistakes and inconsistencies on your calls.**

Solution

Get a single source of truth

Make it easy for your employees to find the help guides and resources they need. **Create a one-stop shop for all of your company's resources.** Then your agents will know exactly where they need to go to find a guide every time they have a question. One option is to get a cloud-based document storage system. A cloud-based system allows you to store and share your documents throughout your company.

Or you could take a **more advanced option with a knowledge base.** A knowledge base allows you to not only store and share your documents, but you can also create procedures in the system. This helps keep your information consistent so it is easier for your agents to follow the steps in the guides.

Pitfall 2

Having printed procedures

While it is nice to have printed procedures for your agents to pull out when they are on the call, the problem is that printed procedures **become outdated quickly.** Procedures are always changing in your company.

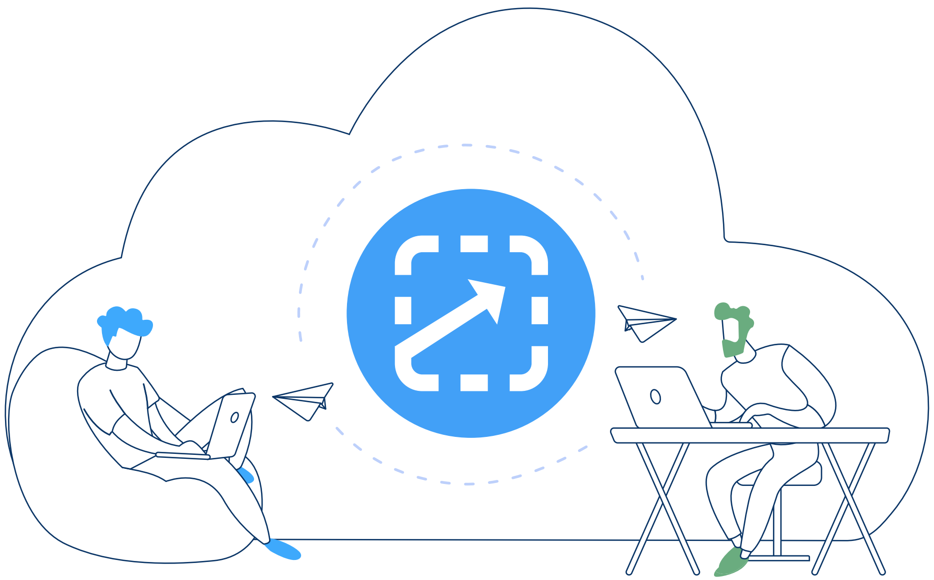
If you make an update to a procedure and an agent hasn't printed out the new procedure, then they are **giving out the wrong information to callers.**

Solution

Have a single source of truth in digital format

Instead of having employees print out new procedures each time you update them, move to a digital format. Use cloud-based software that makes it so your employees can easily find and use your guides.

Some examples of cloud-based software include a **document storage system, searchable online knowledge base, or performance support tool.**



Pitfall 3

Having no standardized procedures

When you don't have standardized procedures for your company, there can be tens or even hundreds of different ways to complete the same task. Since there is no set process, each employee either **makes up their own way to do something** or they **rely on tribal knowledge** (information passed from employee to employee) to learn how to do things.

Sometimes this happens because no processes have been agreed upon, and other times it's because the agreed-upon processes haven't been formalized.

Either way, not having standardized procedures opens the door for **more mistakes and inconsistencies** across the company.

Solution

Document your procedures

Documenting your processes and procedures lets your agents know what is expected of them.

First, you'll want to counsel with your company experts and decide on one way to do procedures. Once you've decided the best way to do procedures. Once you've decided the best way to complete your processes and procedures, write those steps down. Then share the documents with your employees

Pitfall 4

Having procedures that can't stand alone

When your processes and procedures are incomplete, it **discourages your employees from using them.** It nurtures an environment where agents need to create their own way instead of following standardized procedures. Plus, agents lose time asking leaders how to do things.

If reps are telling each other, "Yeah, that's what the procedures say. But this is really how we handle that type of call..." — it's a red flag.

Solutions

Design guides so anyone could follow them

Design your guides so that any agent can follow them the first time they see them. That means your agents **wouldn't need to put the caller on hold** to do further research or ask for help.

Besides **clearly written instructions,** the design elements of your guides could include **decision trees,** **screenshots, arrows, bolding, numbered steps, etc.** Include visual aids to make it clear what order these steps need to be completed in and the agents can quickly look through a guide.

Improve guides from end-user feedback

Provide a way for your end-users to give feedback on the guides. Take those suggestions to make changes to your guides. **Continue to revise and clarify your guides** until they can stand on their own.

You want guides that can stand on their own. This is so that your employees can use the guides without needing to ask leaders further questions.

Pitfall 5

Scaling your workforce without having HR processes prepared

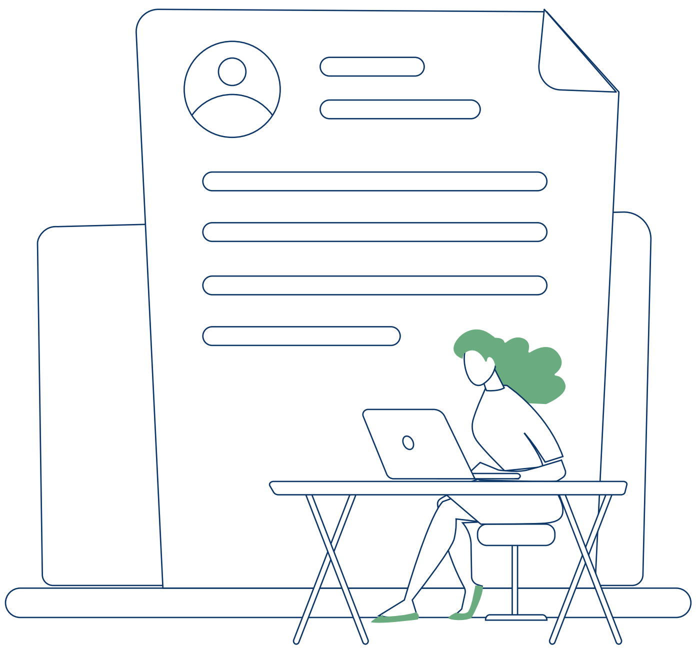
When your company is smaller, it is easier to make sure new hires receive the new hire orientation information and compliance training they need. But when your company is scaling — and hiring more than one employee at a time — it is difficult to track all that needs to be done to onboard those new employees. **Important steps get missed** if you don't have a process prepared.

Solution

Define and document your HR processes

Define what needs to be done with each new hire and then document what steps need to be taken for all of those tasks. **Create checklists, write procedures, and build a start to finish onboarding plan** that you can conduct with dozens of new hires at once.

There are **different tools that help you document and organize your processes.** Figure out which tools you need to document your processes.



Pitfall 6

Allowing your call flows and procedures to get outdated

Call flows and procedures are always changing. Details need to be clarified, information needs to be updated, and then new procedures need to be added. If **only one person is in charge of writing your documents** for your company, it's **easy to let your call flows and procedures become out of date and inaccurate.**

Solutions

Create an authoring team

Organize a team of authors to split up the authoring work. **Designate authors in each specialized section of your department.** In each department, assign experts to oversee and create help guides for these specific areas.

Create a style guide

When you provide your team with a style guide on how you need your articles formatted and what elements they need to include, then more people can author articles.

They **have a reference to create help guides.**

Of course, your content authors will need to edit these before sharing these with the entire company.

Provide opportunities for end-users to provide feedback

Since your end-users are using your call flows every day, they are going to be the first to notice if something is outdated or inaccurate. Use a **documentation platform** that allows your end-users to make suggestions and notify you about necessary updates and changes.

Add a content certification process

Develop a process for reviewing and certifying that all of your **policies, processes, procedures,** guides, and **call flows** are accurate and up to date.

Pitfall 7

Not designating a point person to update procedures

If no one is assigned to oversee the accuracy of **your procedures, then your procedures will become outdated and irrelevant.** Your procedures are constantly changing, whether that be adding a step or swapping out details.

If your agents use outdated guides, they will give out misinformation. Plus, they will stop using your guides because they aren't reliable.

Solutions

Assign individuals to own your content

Designate someone to own your content who will **oversee creating and updating articles.** It is their responsibility to make sure your guides are constantly up to date and accurate so that your agents can use them on calls.

If you have a larger team, you can **divide up the responsibility for creating and updating your content.**

For example, if a manager owns the process of updating the CRM, assign that manager responsibility for creating how-to guides. If another supervisor owns the processes for a specific region, assign that supervisor responsibility for creating and maintaining the guides for that region.

Train agents to rely on your guides

You can justify having a point person designated to keeping guides up to date by having your agents rely on the guides. Your agents should use the guides on every call to avoid making mistakes.

Pitfall 8

Having no plans to communicate changes to your employees

When there are changes to your call center, how are you going to inform your employees about those changes? Call centers are constantly changing and adding procedures. When you change or update a procedure, you need to communicate that to your team and ensure they receive the message.

However, many companies don't have a plan to inform larger groups of employees about changes. In these situations, **agents unknowingly make unnecessary mistakes.**

Solutions

Create a communication plan

Set up a plan so that **agents can form a habit of regularly checking that location** so that they know the most up-to-date information.

Add software tools

You can use tools like **email or chat messages** to share changes with employees. However, the downside of those communication methods is it doesn't require agents to acknowledge they received and read the message. Plus, it is hard to reference those changes by searching email and messaging platforms.

Some **knowledge bases and performance support platforms** allow you to require your agents to acknowledge they've read about the changes. This helps the company ensure compliance and accuracy.

Pitfall 9

Not routing calls

Depending on the size of your call center, you could receive hundreds to thousands of calls each day. And all of those calls are for different reasons. If you don't route your calls, then **it takes longer** for your callers to get connected with the agents who can help them reach a resolution.

Solutions

Write a clear intake script

If everyone in your call center is taking inbound calls, then **write a clear intake script.** An intake script **asks questions in an order that is the fastest route for determining the purpose of a call.** That way, your agents can quickly connect the caller with the appropriate agent (or go through the correct procedure with the caller themselves).

Specialize reps to take inbound calls

Designate one or more reps to answer and route initial calls. These reps will **only take inbound calls** and direct the calls to the appropriate agents.

Specialize reps to take specific calls

If certain calls are trickier than others, you can assign those calls to more tenured reps and come up with a training plan to develop reps for those specific types of calls. Those reps become specialized and very proficient.

You could also use this approach to onboard new reps by having them specialize in very basic calls for the first few months until they get the hang of things. As they gain expertise, you can provide micro-training to prepare them for more advanced types of calls.

Add Interactive Voice Response (IVR)

Use IVR to direct your calls. IVR is an automated answering service that **allows callers to navigate a phone system before they are connected with a human.** Through questions, IVR routes the call so the agent the caller is connected with can complete their request.

Pitfall 10

Hiring the wrong type of reps

Maybe you need to hire reps quickly. Or maybe other barriers are keeping you from hiring the right candidates for your company. The issue is the **people you are hiring are struggling on the job, can't pick up on training, or are quitting after working at your company for a short time.**

Solutions

Determine qualifications and skills

If you aren't intentional in seeking out specific qualifications and skills from your employees, then you will be tempted to hire the first applicant that comes in for an interview. Determine which **qualifications and skills — both soft and hard skills** — are necessary for hires to succeed on the job.

Don't be afraid to hire overseas

Consider outsourcing your call center (or just a section of it). When you **hire a Business Process Outsourcing (BPO) company,** they often have teams of experienced agents.

Depending on your contract with the BPO, they can manage the hiring process and filter through candidates. You will **still want to predetermine the qualifications and skills** your reps should have so that your BPO can select appropriate agents for your company.

Pitfall 11

Not being prepared to deal with turnover

According to the **Quality Assurance & Training Connection,** the **average call center has a turnover rate of 30-45%.** Many new hires quit before training is even over. Despite this statistic, customer service centers continue to hire too few reps in hopes that this time 100% of their new hires will complete the new hire class.

Solutions

Budget for some new hires to quit

Since you know some new hires will quit before they graduate from onboarding, evaluate how many new hires on average quit from your new hire class. **Then hire more reps than you need** to accommodate the number of new hires you anticipate will quit.

Update your training program

Simplify the onboarding process. **Make adjustments to your training program so it is less intimidating.** What changes can you make so that the barriers to learning are less steep? Can you shorten training by adding **continuous learning** and **workflow learning** opportunities?

Decrease the amount of information new hires need to memorize. Eliminate the consequences of failure by teaching new hires where to find and how to use support resources.

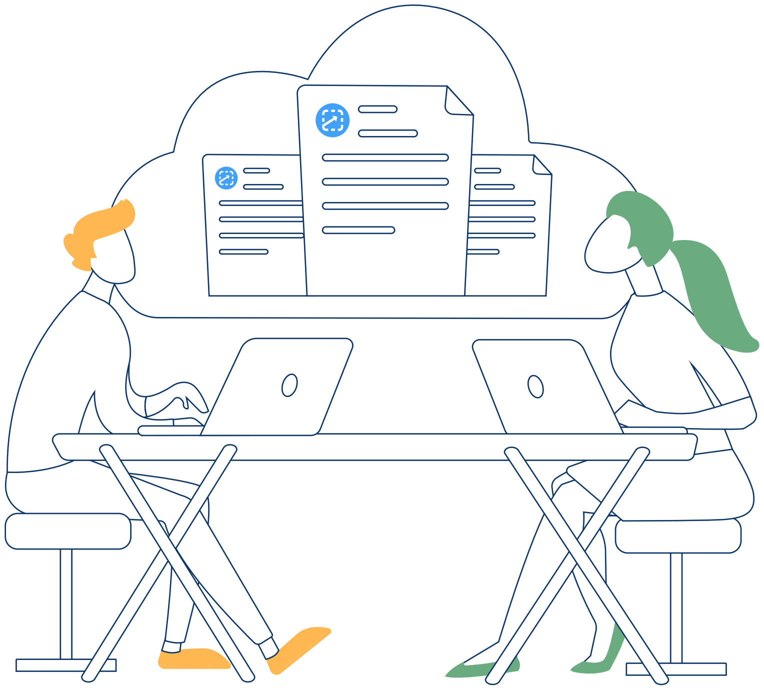
Purchase additional training software

To support your updated training program, you may consider purchasing additional software. Consider getting a **Learning Management System (LMS) or knowledge base** to help systematize the training and onboarding process.

Pitfall 12

Having unclear roles and responsibilities for company leaders

Who is in charge of what in your company? When you don't clearly define the responsibilities and roles of your leaders, then important assignments get missed or forgotten.



Solution

Create a 'Roles and Responsibilities' document for leaders and trainers

Create separate Roles and Responsibilities documents for Managers, Trainers, Supervisors, Phone Coaches, Shift Leads, and any other position that is in charge of leading or developing reps.

In this document, **each role should have clearly defined responsibilities.** Who is in charge of training? Who oversees your software? Who is in charge of keeping your procedures up to date?

If the responsibilities include tasks (e.g. supervisors are responsible for reviewing reps' downtime), include a link/reference to a how-to guide so that it's clear what they are to do AND how they are to do it.

When your leaders know what they are in charge of, they know what they need to do to be successful and you can hold them accountable.

Pitfall 13

Not having the right ratio of managers to agents

The problem is you don't have enough managers to answer your agents when they need help. You have too many agents for one manager to oversee, so **your agents aren't getting the necessary training and assistance.**

Solutions

Hire more managers

Evaluate the ideal manager-agent ratio for your company. **Consider how much time your managers spend answering agents' questions, in one-on-one coaching sessions, and in fulfilling other managerial responsibilities.**

If your new agents heavily rely on the support of managers, supervisors, and team leads, then **a ratio of 10 reps to one supervisor won't work.** You will need to make some changes so that reps have more opportunities to get the one-on-one attention they need to be successful.

If you have other resources to aid agents when they are stuck on a call, then that **ratio of 10 agents to one supervisor might be more realistic.**

Make agents more self-sufficient

Provide your agents other resources that help free up your managers' time for more complicated tasks and resolutions.

You can do this by providing documented help guides that can walk your agents through policies and procedures. The key to these resources being helpful is making them easy for your agents to access and use while on a call.

To do that, you'll want to **purchase employee support software.** Depending on what software your company already has, additional software you should consider is a **knowledge base,** **performance support tool, or document storage platform.**

Pitfall 14

Not having a plan to support a mix of WFH and on-premise employees

Despite having a mix of work-from-home and in-office employees, **you haven't created a plan to accommodate training and working in those different environments.** There is no unity across your organization because the information isn't consistent for all your employees.

Solutions

Update your training to work virtually and in-person

While activities in the classroom don't always directly translate over to virtual training, there are alternatives. Get a video conferencing platform that allows for breakout rooms so you can incorporate scenario-based training. Use a virtual whiteboard to share ideas. Find ways to make virtual training as engaging **as in-person learning.**

Get a single source of truth

Give everyone — no matter where they are working — **access to the same information and resources.** When you get a single source of truth, like a knowledge base, you provide employees an equal opportunity to find answers to their questions.

With a single source of truth, you can **train agents to be self-reliant in finding answers.** As you fill your single source of truth with help guides, policies, and procedures, your employees know exactly where to go to find those answers.

Use workflow learning

Workflow learning focuses on providing reps with learning resources that they can continually refer to after training is over. This approach **reduces the time required for virtual training and makes it much less tedious.** It also produces more consistent training results between WFH and on-prem agents.

Pitfall 15

Only using PowerPoint to train virtually

When you rely on PowerPoint presentations to train your employees virtually, you are limiting what your agents can learn.

Solutions

Include scenario-based training

Scenario-based training is a training concept that has **employees role-play situations** that they will encounter on the job. It's a form of hands-on experience to prepare employees for the realities of their position. In virtual training, focus on presenting scenarios that reps will need to respond to instead of presenting information on a slide.

Share resources to support employees after training

Provide resources that will help the reps respond to the scenarios and show reps how to use those resources. These can be in a **variety of documented formats** call flows, help guides, step-by-step procedures, charts, infographics, etc.

Provide continuous learning opportunities

Your employees won't remember everything that you put on your PowerPoint presentation. How are your employees going to progress and improve on the job? Teach employees to **use your documented resources** to continue learning.

Adopt a single source of truth

To support continuous learning, **adopt a knowledge base or performance support tool.** This will help your agents learn how to handle new tasks while in the workflow.

Pitfall 16

Expecting reps to memorize

Requiring employees to memorize all of your policies and procedures is a losing battle.

Solutions

Document your procedures

If you can't expect your reps to memorize everything in training, you need to **provide them with resources that will help them remember and guide them through processes.** **Write down your procedures** — no matter how complex — in step-by-step instructions.

You'll want to write guides that are easy to follow so that your agents don't lose time reading detailed instructions.

Teach reps to use your call flows on every call

Train your agents to use your help guides on every call. By doing this, your agents will have a resource to aid them through a call as well as help them avoid making mistakes. Ultimately, reps following your guides can help **improve your QA and CSAT scores.**

Scenario-based training

Have your agents practice finding and using your help guides during training. Scenario-based training is when you have **agents role-play real scenarios** they will encounter while on a call. It helps prepare them on how to handle different situations.

Pitfall 17

Waiting too long to put reps on calls during training

Sometimes you want your new hires to know everything before putting them on a call. Unfortunately, when you don't allow reps to hop on calls early in training, **they lose track of information.** They don't master one call type before moving on to the next.

Solutions

Create call flows that reps can follow

Write call flows that walk agents through the different decisions in a call. Make them so simple that they can **follow the guides without putting a caller on hold.** During training, practice going through the call flows using real scenarios.

Train on a pyramid

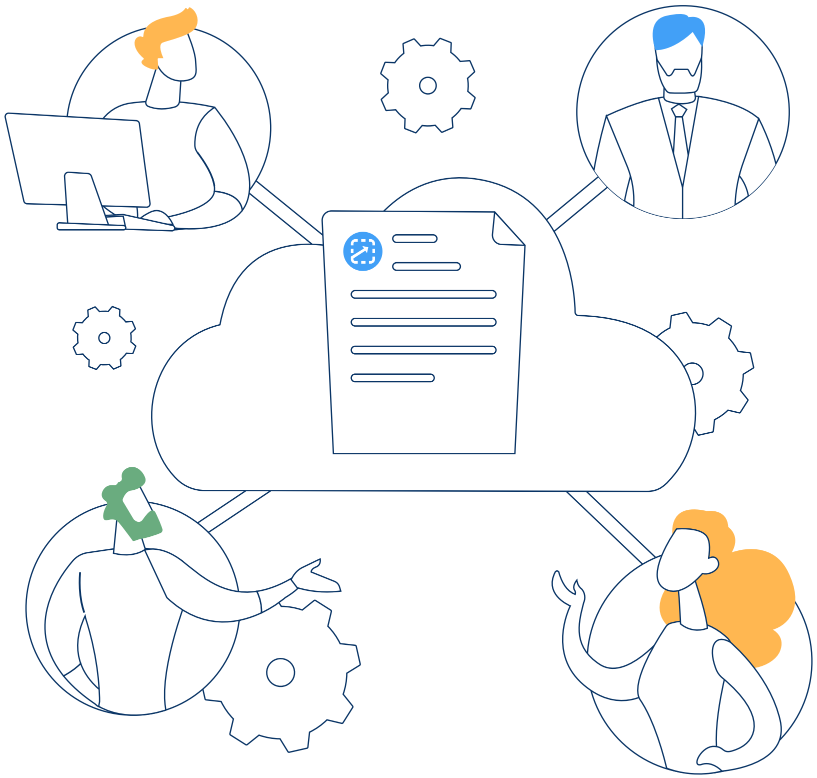
Don't require your agents to be experts at every type of call all at once. Instead, train on a pyramid. **Allow new reps to take easier calls (real ones) right away.** Then tack on more difficult calls as they become more comfortable with the easier calls.

If you are not categorizing calls, allow new reps to do intake calls. If it's an easy call, they can take it. If it's not, they can transfer it to another rep.

Pitfall 18

Relying only on email or chat messages to support reps

When you only use email or chat messages (like Teams, Skype, or Slack) to support your reps, it makes it difficult for reps to reference that information later. Even with search, agents have a hard time finding messages you sent about updates or changes.



Solution

Provide a single source of truth

Build a knowledge base or document library that agents can turn to for answers to all of their procedural questions. Fill that single source of truth with all your policies, processes, and procedures so that agents can be more self-reliant.

Instead of explaining things in chat, **answer agent questions by pointing to your guides.** If reps ask a question that is answered in a guide, send them the link to that resource when responding to them in chat.

5 overarching solutions to these call center pitfalls

There are many ways to tackle the same pitfalls in a call center. And there are many variations for those solutions.

As a quick review, here are some of the solutions to the call center pitfalls and what their strengths are.

1. Document policies, processes, and procedures

When you write out your **policies, processes, and procedures,** you create resources that others from your company can learn from and use on the job. **Documented procedures** **provide consistency in a call center,** relying on expert directions instead of tribal knowledge. With this solution, you'll need a universal place your employees can access your resources.

For tips on what to include in your documented procedures, read about how **long to make your company's written procedures.**

2. Knowledge base (single source of truth)

A **knowledge base** is a **one-stop shop for all of your company's resources.** With a cloud-based knowledge base, you can create, store, and share documents across your organization. To learn more about picking the right knowledge base solution for your company, read this article on **five tips for researching and deciding on knowledge base software.**

(Cont.)

3. Performance support tool

The function of a performance support tool is to **provide "just-in-time-learning" to agents.** It works together with your other software systems and resources to **support your reps while they are in the workflow.** That can be through checklists, step-by-step instructions, and other options.

4. Scenario-based training

With **scenario-based training,** you provide your agents **experience with real situations before they encounter them on the job.** Scenario-based training has agents role-play different scenarios they will deal with in the call center.

To learn more about how scenario-based training can help cut down your training time by 75%, **download our eBook.**

5. Learning management system (LMS)

A **learning management system (LMS)** provides employees with self-paced learning opportunities. There are different types of LMS software available. Overall, an LMS has **self-paced courses, quizzes, learning activities, and other learning opportunities** to help train reps.

To learn more about the role of an LMS in a company, read this article **comparing an LMS and knowledge base.**

	Document Policies, Processes, & Procedures	Knowledge Base (Single Source of Truth)	Performance Support Tool	Scenario-Based Training	Learning Management System (LMS)
Having documents scattered in different places		✓			
Having printed procedures		✓			
Having no standardized procedures	✓				
Having procedures that can't stand alone	✓				
Scaling your workforce without having HR processes prepared	✓				
Allowing your call flows and procedures to get outdated	✓				
Not designating a point person to update procedures	✓			✓	
Having no plans to communicate changes to your employees		✓	✓		
Not routing calls	✓				

	Document Policies, Processes, & Procedures	Knowledge Base (Single Source of Truth)	Performance Support Tool	Scenario-Based Training	Learning Management System (LMS)
Hiring the wrong type of reps					
Not being prepared to deal with turnover		✓		✓	✓
Having unclear roles and responsibilities for company leaders					
Not having the right ratio of managers to agents	✓	✓	✓		
Not having a plan to support a mix of WFH and on-premise employees	✓	✓		✓	
Only using PowerPoint to train virtually	✓	✓	✓	✓	✓
Expecting reps to memorize	✓			✓	
Waiting too long to put reps on calls during training	✓				
Relying only on email or chat messages to support reps		✓			

Avoid multiple problems while scaling your call center with one software solution

There are many ways to prepare your call center to scale and train more agents. Unfortunately, your company might not have the time, budget, or resources to incorporate all of these solutions.

So, which solution is right for you? And where should you spend your time and money?

One of the best ways to **support a growing call center is to have agile software** that helps you train and support large hiring classes and employees all at once.

ScreenSteps is a SaaS company for growing businesses that can't afford to have call center agents make mistakes. It is a **knowledge base software and performance support tool all in one, which focuses on** enabling your employees to do their jobs.

Want to see how ScreenSteps can help you avoid some of these pitfalls? Learn more about **how ScreenSteps can help you overcome these pitfalls at screensteps.com.**