

# Contact Center- CSR Team Lead Certification Program

## Unit Descriptions

### Unit I - Week 1

Unit One focuses on the specific skills that are needed for developing an effective team and then managing team members. In a Contact Center, Team Leads/Supervisors not only have to be able to ensure that their team is meeting the needs of customers; they also need to ensure that they are meeting the expectations of their organization. This means being able to manage a diverse team. Every member of your team will come to their positions from a different perspective based on who they are and their background. It is the job of the Team Lead/Supervisor to be able to understand and manage diversity so that their team is effective and efficient. In this unit you will reflect on the supervisory and leadership skills and strategies that you will need as you move into a managerial role.

#### Module 1: Building the Foundation for an Effective Team

The way in which a team is built is an important factor in determining team success. Leading a team quickly and smoothly into high performance mode requires the groundwork of pulling the right team together, setting team goals, and defining the standards of team behavior. In this course, you'll learn about the five stages of team development and strategies for selecting high-performing team members most suited for your project or team. You'll also learn about laying the foundation for a successful team, including setting team goals, assigning roles to individual team members, and defining specific guidelines that outline how team members should behave to minimize conflict and optimize team performance

#### Module 2: Directing Others

It costs a business much more to acquire a new customer than it does to retain an existing one. So it makes sense that a business must do everything it can to support and satisfy existing customers. Handling questions, issues, and complaints effectively and efficiently can result in increased customer loyalty. Today's Customer Support centers have a vital role to play in ensuring customers' needs are addressed in an effective, efficient manner. This module will focus on the essential managerial skills that are necessary for Contact Center Team Leads to manage others for the benefit of the company, the customers and the development of the employees themselves.

## Module 3: Managing a Diverse Team

The population as a whole is becoming ever more diverse. Naturally, these societal changes are mirrored in the workplace. The most forward-looking organizations recognize the importance of managing a diverse workforce effectively. In turn, those managers who have the skills to lead a diverse team successfully are highly valued. This module describes what diversity is, including its benefits. It also covers how to prepare to manage a diverse team by understanding key diversity issues and setting ground rules. Finally, it delineates techniques for managing a diverse team.

### Unit II - Week 2

Unit Two is focused on overall quality control in a Contact Center. The Team Lead/Supervisor is responsible for ensuring that team members have the skills they need to understand and properly manage all customer contacts including the ability to communicate effectively. The Team Lead/Supervisor is also responsible for monitoring the performance of the team. In this unit you will reflect on how you monitor your own performance and your own communication skills and how you could use these for the management of a team in a Contact Center.

## Module 1: Quality in a Support Center

Failing to realize the importance of customer service and effective complaint handling leads to increasingly dissatisfied customers. Organizations need to be able to address the needs of customers in an effective and efficient manner in a way that leaves customers feeling valued and satisfied. This module is intended to show the proper procedures and processes needed to manage a team to provide effective customer service: how to overcome communication problems, and how to use active listening in order to best support customers.

### Unit III - Week 3

The focus of Unit Three is on how to build a high performing team and one of the most important tasks of a team in a Contact Center, managing customer service problems. Incident management best practices are examined which can be implemented in a Contact Center. In this unit you will also be asked to reflect on your own skills and experiences in incident management and how you would apply the skills you learn in this unit.

## Module 1: Team and Customer Relationships

Customers who experience problems with your service represent a significant challenge to your company. If the support center is able to deal with incidents efficiently, your company can benefit enormously. Reputation and customer satisfaction can be restored and procedures can be established to recognize and prevent future incidents. This module examines the processes involved in incident management and how a support center can use them to best effect. The

module introduces the concepts behind incident management, demonstrates how to deal with and close incidents correctly, and teaches how to apply Service Level Agreement terms and Quality Assurance principles.

## Unit IV - Week 4

Unit Four continues to focus on overall quality control in a Contact Center. The Team Lead/Supervisor is responsible for applying a variety of tools and processes to monitor the performance of the team. In this unit you will reflect on how you could use these for the management of a team in a Contact Center.

### Module 1: Support Center Tools, Technologies and Metrics

Customers contacting Support Centers expect the same level of professionalism each time they interact with a Customer Service Representative (CSR). To ensure this consistently high level of service, the Contact Center Team Lead can draw an array of management tools and processes that both guide and measure performance. This course is intended to demonstrate the management and measurement tools a Contact Center Team Lead and a professional CSR is expected to use when dealing with individual customers and participating in the overall operation of the Support Center. The skills and knowledge required include how to use tools associated with problem, change, knowledge, and security management

## Unit V - Week 5

Unit Five explores in greater depth the challenges that a Team Lead/Supervisor encounters in the management of individuals in their teams, and the skills and processes that need to be applied. In addition to managing what team members do, the behaviors of team members also need to be managed. In the unit how to approach challenging behaviors of team members is covered. As part of this, how to develop direct reports is examined, including creation of individual development plans, monitoring performance, and how to effectively provide feedback. In this unit you will reflect on how team member behaviors can have positive or negative effects on overall team performance and the workplace atmosphere. Building on your own experiences in a Contact Center you will identify how the strategies from this unit can be leveraged by Team Leads/Supervisors.

### Module 1: Developing your Direct Reports

A main goal of managing is developing your direct reports. This involves not only coordinating their work in a way so your organization's business objectives are met, but also empowering them and providing opportunities for them to meet their own professional development objectives. This course provides an overview of the importance and benefits of developing your direct reports as a manager, and tactical strategies for doing so. Specifically, this involves an

examination of the steps required to assess the development needs of your employees by differentiating individual requirements. Also covered is the importance and methods for creating a development plan with your employees based on their individual requirements, and ways to support the development plan by creating opportunities for practice and growth in skills and abilities. Finally, this module introduces ways to continue supporting employees through follow up and monitoring, and ongoing and timely feedback

## Module 2: Confronting Difficult Employee Behavior

As a manager, you will inevitably encounter direct reports who exhibit difficult behavior, which can disrupt entire teams and departments. It's your job to confront difficult behavior as early as possible to minimize the disruption. Whether they are blatant or less obvious, behavioral problems need to be addressed before they affect morale and productivity. If you ignore them, they will eventually affect your team, your company, and possibly even your career. Confronting behavioral problems as they arise can quickly get things back on track and can lead to a more positive work environment for all.

## Module 3: Working Out and Through Conflict

When you are dealing with workplace conflict, emotions get stirred up, and many people want conflict to 'go away.' But in most cases it won't go away on its own, so you need to choose a course of action. Sometimes it just means making peace with yourself or a situation. Other times, you may need to make trade-offs. If your choice is to deal with it straight on, you need a process. In this course, you'll learn how to work through conflicts smoothly by using a structured conflict resolution process. You'll also learn about techniques for getting the process back on track if difficulties arise.

## Module 4: How to Manage Difficult Conversations

For managers, approaching a difficult conversation – whether it's with a direct report, colleague, or manager – can be immensely stressful. Handled the wrong way, this kind of conversation can also damage your work relationships and leave you feeling unsure of your abilities. With the right preparation and mindset, you can make sure this doesn't happen. In this course, you'll learn some basic guidelines about when and where to initiate a difficult conversation, and useful steps for managing the associated stress. You'll learn how to prepare for a difficult conversation using a four-step process, so that you're confident and able to manage the conversation constructively. Finally, you'll learn how to demonstrate that you have the right mindset during the conversation so that it has the best possible outcome.

## Unit VI - Week 6

Unit Six shifts the focus to the other organizational expectation of a Team Lead/Supervisor – how they can help to create and enhance the overall customer service environment and processes in an organization. This involves a combination of attitudes and skills coupled with knowledge of the tools and solutions that are available for a Team Lead/Supervisor to apply



depending on the specific needs of any situation. In the unit strategies to help identify key customer needs and “moments of truth” are examined and how these can be applied to the continuous improvement of customer strategies within an organization. In this final unit you will be asked to reflect on your own experiences as a Customer Service Representative and then consider how you will be able to build on your experience and your strategies in the role of a Contact Center Team Lead/Supervisor.

## Module 1: Creating and Sustaining a Customer-focused Organization

To create a customer-focused organization, you need an in-depth understanding of what types of customer-focused tools and solutions are available. And you must know the level of customer focus that you're seeking to achieve. As a Team Lead, you also need to know how to select the most appropriate implementation strategy that aligns with your organization's capabilities and its objectives. This will help you to create stronger, more valuable, and lasting relationships and experiences for your customers. This course provides direction on how to approach, implement, and sustain effective customer-focused service strategies in order to increase your organization's competitive advantage.

## Module 2: Shaping the Direction of Customer Service in your Organization

There are several defining moments or moments of truth that can make or break every service transaction. To successfully navigate these moments of truth, it's important for service organizations – and specifically customer service leaders – to add value to a customer's experience by creating and implementing strong, clearly-defined service standards. To implement effective standards and strategies, it's crucial that you stay attuned to customer needs and expectations, building a dynamic, adaptive service strategy based on input such as market research and customer feedback. This module explores strategies used to shape the direction of customer service in your organization including defining moments of truth, the creation and implementation of quantifiable service standards and methods of evolving your customer strategy to meet the changing needs of your customers.