

Momentum Training Solutions

Customer Service Case Study



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Objective:

This case study will showcase how a ‘Customer Service’ intervention that MMM Training Solutions ran for the ‘Global Shared Service Centre’ of a Fortune 500 organization resulted in an average improvement of about 20% in the customer service skill sets of around 150 participants and more importantly a change in their mindsets toward developing a ‘Culture of Customer Service’.

Executive Summary:

A ‘Global Shared Services Center’ of a Fortune 500 organization approached MMM Training Solutions to help them with a training intervention that would not only improve basic customer handling skill sets but also help facilitate a change in the mindset of their employees toward becoming more customer service oriented as individuals and as an organization.

MMM Training Solutions used a six step training and development intervention that included:

- Training Needs Analysis
- Customized Design of Training
- Pre-training Assessment
- Delivery of Training
- Post-training Assessment, and
- ‘Refresher’ Training



By working in coordination with the HR, Operations and Quality teams of the client organization, MMM Training Solutions not only helped bring about a positive change in the team's culture towards customer service but also facilitated a 20% improvement in the customer service skill sets of various teams.

Client Background:

Our client is the 'Global Shared Services Center' of a Fortune 500 organization from the Banking Industry. They handle a range of services such as supporting HR processes, Software Development and Maintenance, Security Management, IT services and Helpdesk support.

They cater to internal customers of their parent company from different parts of the globe including India. We worked extensively with their IT Services, Helpdesk support, Security Management and HR Support divisions.

For the purposes of this case study, our focus will be on the training intervention we undertook for the IT services and Helpdesk Support team.

Challenges Faced:

The Training Manager, Quality Manager and the Operations Manager outlined to us that the major challenge that they faced was that most of their IT Services and Helpdesk employees were not customer service oriented. Although, they possessed good technical skills they just had not been able to see the importance of customer service as they were dealing with 'internal customers' i.e. employees of the parent company, who had no one else to turn to for their IT support needs.



They had also outlined that the team needed to have a professional approach to customer service, problem solving and call handling as part of the IT Helpdesk operations. This included:

- Change in mindset toward a ‘culture of customer service’
- Politeness and courtesy when speaking to customers
- Using the right telephone etiquette
- Using the right e-mail etiquette
- Taking ownership
- Dealing with different types of customers

They also had a set of parameters that were used to evaluate performance which they wanted us to further refine and hold participants accountable for.

Pre-training Preparation:

Prior to the delivery of the training intervention an in-depth study of the situation was carried out by the MMM Training Solutions Team. Our pre-training preparation focused on the following areas:

- We met with key stakeholders to understand the situation from the Operational, Quality and HR and Training point of view.
- Sample calls of customer interactions were listened to, in order to better understand the nature of challenges that the stakeholders had previously identified.
- The soft skill and customer service parameters used to assess the employees were reviewed. Additions were made and changes suggested based on the key areas that were to be focused on during the training intervention.
- The training program was then customized and designed based on the key challenges, in terms of customer service, that needed to be overcome.



- The employees were split into batches of 15 participants each for the training program.
- A pre-training assessment was conducted for every batch to assess each individual's customer service skill sets with a score being assigned to each individual.
 - This pre-training assessment was jointly conducted with the Quality department of the client organization in order to ensure that the quality team was in sync with the parameters used for evaluation.

The Training Program:

The training programs were initially conducted for five batches of participants from the voice based support operations. Subsequent training programs were also conducted for non-voice based support teams primarily focusing on customer service over e-mail.

Duration:

Each batch went through a training program that was for 16 hours split into 4 sessions of 4 hours each. This format proved to be very effective as it gave the participants an opportunity to implement learning that they had gained on a daily basis in their jobs.

Training topics:

The training programs focused on the core skills of:

- Developing a customer service mindset
- Understanding the elements of great customer service
- Understanding and managing customer expectations
- Call handling skills and E-mail etiquette
- Dealing with different kinds of customers
- Polite and friendly phrases to use that sound professional



Methodology:

Numerous role-play simulations of customer facing situations with feedback from the facilitator and peers were used to help participants perfect their customer handling skills. The use of group games, movie clips and case studies along with Instructor Led Training (ILT) helped increase interaction levels within the room and improve retention of learning, thus achieving greater impact.

Audio recordings of sample calls that were categorized as ‘good’ calls and ‘bad’ calls were played so that participants would clearly understand the behavior patterns that needed to be emulated and those that needed to be eliminated. The participants found this particularly useful.

Feedback:

Every batch that underwent the training program felt that it was “very helpful”, practically applicable and helped changed their focus towards being more customer oriented. An average overall feedback rating of 4.5 out of 5 on the training programs corroborated the same.

Post-training Intervention:

A post-training assessment was conducted one week after the completion of training for each batch. During the assessment the facilitator, along with the Quality analyst from the client organization, assessed the calls/e-mails of each participant and gave them individual one-on-one feedback. The feedback focused on areas in which they had shown improvement, areas in which they needed to show improvement and the key areas they needed to focus on in their improvement action plan.



Results:

The result was that the participants showed an average overall improvement of 10-15% in terms of quality of performance, specifically focusing on customer service.

The participants showed major improvement in the following areas:

- Developing a 'Customer Service' mindset
- Call handing/e-mail handling skills
- Politeness and courtesy
- Understanding the need to take ownership

Refresher Training:

Although the first intervention went successfully, we knew that the momentum of learning and change that the training program had successfully helped create needed to be nurtured and sustained. We received able support from the HR, Operations and Quality teams at the client organization in this regard.

We conducted a 4 hour refresher session for each batch one month after their initial training program. This session focused on key areas in which the participants were not showing significant improvement. These areas were identified by means of a short pre-training assessment conducted prior to the start of the 'Refresher' training program. These 'Refresher' training programs were also followed by post-training assessments where individual feedback was given to each participant.

As a result, participants showed a further 5-10% improvement in their customer service skill sets. This meant that at the end of a month participants had shown an average overall improvement of about 20%.



Conclusion:

The client organization was delighted with the results. So delighted, that they wanted us back to conduct a 'Level 2 - Customer Service' training intervention to see how they could take their teams to the next level of bringing about 'Customer Delight'.

We continue to work with the organization to this day. Our successful work with the IT Support and Helpdesk team opened up opportunities to do more successful work with other facets of their business including HR support, Security Management and their Leadership team.

Today, we are not looked at as an organization that just delivers training for them but more as a strategic learning partner who is helping them focus on the core of their business - developing people.