

***Individual, Team, and Organization Assessment***

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## ***Introduction***

The goal of measuring performance is to provide clear insights so that adjustments can be made to improve organization performance (Performance Measurement Association, n.d.). To achieve such meaningful insights, selection of performance measures is critical (National Institute of Standards and Quality, 2003, p. 3). Assessing the performance of organizations can take place at three levels: the individual, the group or team, and the organization as a whole (Brewerton & Millward, 2002, p. 123): This paper presents research designs for assessing performance of call center operations for each of the three levels. First, principles for evaluating strengths and weaknesses of research designs are presented. Subsequently, research designs for assessing call center agent performance, agent team performance, and the impact of call center operations on organization performance in terms of customer satisfaction is presented. Included for each research design is a brief evaluation of the strengths and weaknesses.

Much of the specific information around call center operations is drawn from the author's experience working in a call center, and credit is hereby given as a source of information.

## ***Basis of Evaluating Research Designs***

Brewerton and Millward (2002) present five principles for evaluating measurement criteria: objectivity, reliability, validity, discriminability, and accessibility (p. 124).

Objectivity is observation or experience that is not dependent on any one individual and is consistently perceptible by others (Merriam-Webster, n.d.). Mutchler (2003) defines

objectivity as a situation where “biases do not inappropriately affect assessments, judgments, and decisions” (p. 236). Brewerton and Millward (2002) explain that objectivity is obtaining the same results regardless of who does the measuring (p. 124).

Reliability is the extent to which a research instrument delivers consistent results every time it's applied (Key, 1997). Mark (1996) points out that the “essence of reliability is repeatability” and that if the property being measured is constant yet there is variability in measurement results, then the instrument is unstable and the variability can be attributed to error (p. 285). Reliability means that any measurement variation over time is due to the factor being measured rather than any other factors.

Validity is whether or not a research instrument measures what it intends to measure (Key, 1997; Mark, 1996). Mark (1996, p. 289) cites an example that illustrates the concept effectively: does an IQ test really measure intelligence? Or, does it measure reading ability, test taking ability, or middle class socialization?

Discriminability is distinguishing between various levels of performance in a manner that provides useful distinctions and a fair assessment (Brewerton & Millward, 2002, p. 124). Discriminability is the provision of meaningful gradations along a scale and a distribution of measurements that allow equitable distinctions about performance to be observed.

Accessibility is the relative ease or practicality of obtaining a measurement (Brewerton & Millward, 2002, p. 124). This includes cost effectiveness of data acquisition.

The individual, team, and organization assessment approaches are evaluated by these aspects of objectivity, reliability, validity, discriminability, and accessibility.

### ***Individual Assessment***

Success of call center operations depends upon the effectiveness of individual customer representatives (agents) who answer customer inquiries over the telephone.

There are various criteria used to evaluate agents (including call handling time, attendance, productivity, time in service, and schedule adherence), but agent call handling quality is the particular assessment need under consideration. Quality in agent call handling includes three dimensions: courtesy and interaction with the caller, call handling skills, and technical skills in satisfying the reason for the call. To assess the quality of agents in taking customer calls, the data needed is summarized in Table 1.

**Table 1 – Data Needs for Individual Agent Assessment**

<b><i>Quality Dimension</i></b>	<b><i>Data</i></b>
Courtesy and Interaction	Appropriate greeting consistent with guidelines
	Listening and acknowledging customer questions
	Asking clarifying questions
	Professional, patient, polite
	Addressing the customer by name
	Summarize work completed and set expectations
	End the call with appropriate closing
Call Handling Skills	Verifying the caller's identify using guidelines
	Verifying and updating caller's telephone and address
	Using the "screen pop" that presents customer data at the start of the call
	Correct analysis of the account using available system screens
	Providing clear, concise, and correct information
	Proper referral of account to other processes for resolution
	Relevant notes logged in system
	First call resolution to ensure caller does not need to call back
Technical Skills	Disconnect, Turn On, or Service Restore (7 attributes)
	Billing (4 attributes)
	Credit and Collection (6 attributes)
	Gas Leak (5 attributes)
	Downed wire (6 attributes)
	Outage (5 attributes)

The plan is for quality analysts to collect the data by reviewing audio and video recordings of agent calls. Specialized computer technology records the call audio as well as the video of agent interactions with the computer screens. Quality analysts view the recordings at a convenient time and record evaluation results using a form designed for that purpose. A minimum of one call per week is assessed for every agent.

Minimizing selection bias is a major concern. Selection bias occurs when results are affected by the placement of individuals into groups being studied (AllPsych, n.d.), in this case the assignment of agents to quality analysts for evaluation. There is risk of favoritism or other inappropriate influence of quality analysts. This bias is minimized by blind queues for agent assignment to quality analysts, rotation of assignments so agents are not regularly reviewed by the same quality analyst, and random selection of recordings for evaluation.

Integrity of the process relative to its reliability is also a major concern as there is much potential for subjective interpretation of call results. The use of a fixed alternative item (Yes/No) rather than a summated rating scale eliminates degrees of compliance to a quality goal; it either meets the criteria or it does not. Mark (1996) states that reliability can be increased by “clear and standardized instructions” (p. 288). In this situation, reliability is continually addressed by weekly meetings of all quality analysts and agent team leaders for group review of actual calls. The goal of these meetings is to develop consistency in the evaluation of call results. Periodic review of process, instrument, and application of results by third party expertise improves the value of the approach.

Table 2 shows that the characteristics of the individual agent assessment instrument are strong in objectivity, reliability, and validity. Discriminability of measurement results is sacrificed to enhance objectivity, reliability, and validity. Call recording technology provides Accessibility, but this technology is expensive.

**Table 2 – Evaluation of Individual Agent Assessment Approach**

Key:

+ tends to enhance

– tends to diminish

<b>Characteristic</b>	<b>Objectivity</b>	<b>Reliability</b>	<b>Validity</b>	<b>Discriminability</b>	<b>Accessibility</b>
Call recording technology	+				+
Blind queues for assignment of Agent-to-Quality Analyst	+				
Rotation of agent assignment to Quality Analyst	+				
Random selection of call recordings	+				
Fixed alternative items	+	+	+	–	
Quality Analyst group review of call recordings	+	+	+		
Agent Team Leader group review of call recordings	+	+	+		
Weekly Agent sampling frequency			+		
Outside expertise; periodic review and revision		+	+		

### ***Team Assessment***

Agent teams are groups of seven to nine agents with a team leader. Effectiveness of agent teams within the call center is based primarily upon the ability of the team and its leader to provide agent learning experiences for effective call handling, build team unity to increase agent retention, and develop a mutual support system between agents for handling difficult call scenarios. Otherwise, agent teams do not have a significant amount of teamwork or team synergy because handling a phone call is an individual encounter between a single agent and a customer. Nevertheless, a team evaluation instrument is useful to gather data about relevant aspects of team performance and to gain insights into new opportunities to build teamwork within the call center.

Of particular interest for agent teams is leadership, team processes around learning, and interpersonal relationships. To assess team performance in these areas, the data needed is summarized in Table 3.

**Table 3 – Data Needs for Agent Team Assessment (Partnerwerks, n.d.)**

<b>Area</b>	<b>Factor</b>
Leadership	Inspirational leadership
	Project management
	Clarity of purpose
	Autonomy
Resources	Professional and technical expertise
	Equipment and facilities
	Information sharing
	Market/client awareness
Team Process	Conflict management
	Team brainstorming
	Team learning
	Climate for creativity
Interpersonal Dynamics	Trust
	Respect for individuals
	Status equality
	Goodwill and cooperation
	Alignment of values

The plan is to use the Knowledge Team Effectiveness Profile (Partnerwerks, n.d.) to collect the data needed to assess agent team performance. The Knowledge Team Effectiveness Profile is a team assessment instrument designed and administered by a third party specializing in this area. This instrument is administered to agent team members on a bi-quarterly basis. There are several advantages to this approach: 1) use of a standard model of team effectiveness validated through extensive research, 2) a simple, confidential, and easily accessible self-administered questionnaire, 3) a profile of team performance and comparison against other agent teams, 4) prioritized areas for improvements, and 5) a framework to apply team learning (Partnerwerks, n.d.).

Table 4 shows that the characteristics of the agent team assessment instrument are strong in objectivity, reliability, and validity. An instrument design validated by research provides good discriminability, and internet based data collection as well as third party administration provides good accessibility. Overall, this is a strong instrument for team research due to the expertise offered by an outside company specializing in this area.

**Table 4 – Evaluation of Team Assessment Approach**

Key:

+ tends to enhance

– tends to diminish

<b>Characteristic</b>	<b>Objectivity</b>	<b>Reliability</b>	<b>Validity</b>	<b>Discriminability</b>	<b>Accessibility</b>
Third party instrument design	+	+	+	+	
Internet form	+				+
Third party administration	+	+	+		+
Evaluation & presentation of results	+	+	+		+
Validated model of team effectiveness	+	+	+	+	
Inter company comparison	+	+	+		
Team performance profile	+	+	+		

### **Organization Assessment**

Since a call center is often the customer’s only personal contact with the company, customer satisfaction and loyalty is directly related to the customer’s experience interacting with an agent during a telephone call. What are the direct links between the customer’s call center experience and customer satisfaction? What operational areas in the call center contribute most to customer satisfaction? In what areas would improvements provide the largest customer satisfaction return? What are the links between customer service and financial outcomes? These are all important questions which customer satisfaction research can provide insights. (Market Strategies, n.d.)

The data needed to assess customer satisfaction relative to their call center experience is summarized in Table 5.

**Table 5 – Data Needs for Organization Assessment**

<b>Category</b>	<b>Item</b>
Overall Experience	Overall experience with company
	Overall quality of service
	Easy to reach
Most Recent Contact	Time frame of recent contact with call center
	Main reason for call
	Speak to an agent
	Type of service (gas or electric)
	Quality of automated phone system
	Approximate number of minutes spent talking to an agent
	Overall time spent on call reasonable
	Overall rating of company on: resolving problem or inquiry, caring, trust
Transaction	Company actions to improve your satisfaction with the call
	Billing related
	Estimated bills
Call Handling Procedures	Other
	Number of calls to resolve problem over what period of time
	Multiple calls necessary, reasonable
	Minutes waiting to speak to agent, reasonable
Courtesy and Interaction	Placed on hold
	Overall performance of agent
	Rating on agent performance attributes: courteous and polite, knowledgeable, demonstrated concern, listening carefully
Customer demographics	Age, education, gender, income range, ethnicity, internet access

The plan is to outsource this research to a third party company with expertise in customer satisfaction market research. A trained interviewer from the research company administers the instrument over the telephone on a quarterly basis drawing customers randomly from a sample provided by the organization. The instrument has a combination of open ended questions, fixed alternative items, and items with summated rating scales. The research company analyzes the data using proprietary statistical techniques and presents the results each quarter.

Table 6 shows that the characteristics of the organization assessment instrument are strong in objectivity, reliability, and validity. An instrument design validated by research provides good discriminability, and third party administration provides good accessibility. Overall, this is a strong instrument for organization research due to the expertise offered by an outside company specializing in this area.

**Table 6 – Evaluation of Organization Assessment Approach**

Key:

- + tends to enhance
- tends to diminish

<b>Characteristic</b>	<b>Objectivity</b>	<b>Reliability</b>	<b>Validity</b>	<b>Discriminability</b>	<b>Accessibility</b>
Third party instrument design	+	+	+	+	
Third party administration	+	+	+		+
Evaluation & presentation of results	+	+	+		+
Validated model of financial outcomes	+	+	+	+	
Inter company comparison	+	+	+		
Customer satisfaction index	+	+	+	+	

## **Conclusion**

The approaches for the individual agent, agent team, and organization assessments all follow good design principles and thus can provide the organization with valid and meaningful insights into the performance of the call center organization. From these insights, a program of continuous improvement that focuses on each of the three levels can address improved call center performance. Increasing levels of customer satisfaction and loyalty likely are a result of call center performance improvements and this benefits the entire organization. The importance of using performance measurement initiatives to evaluate performance of the organization in order to make process improvements cannot be overstated. This is a wise investment of resources as a means for the organization to continuously improve its performance.

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