

This is an excerpt and overview of the Training Agents toolkit.

### Training roadmap overview

This section will provide you with the “big picture” roadmap for the training toolkit.



## Overview

The Call Center Training Development Roadmap consists of 15 individual processes (see Figure 1). These processes can be grouped into five categories based on your perspective or orientation:

- strategic perspective
- management perspective
- training perspective
- learners’ perspective
- delivery and evaluation perspective

Each of these perspectives will need to be considered to form a world-class training organization.

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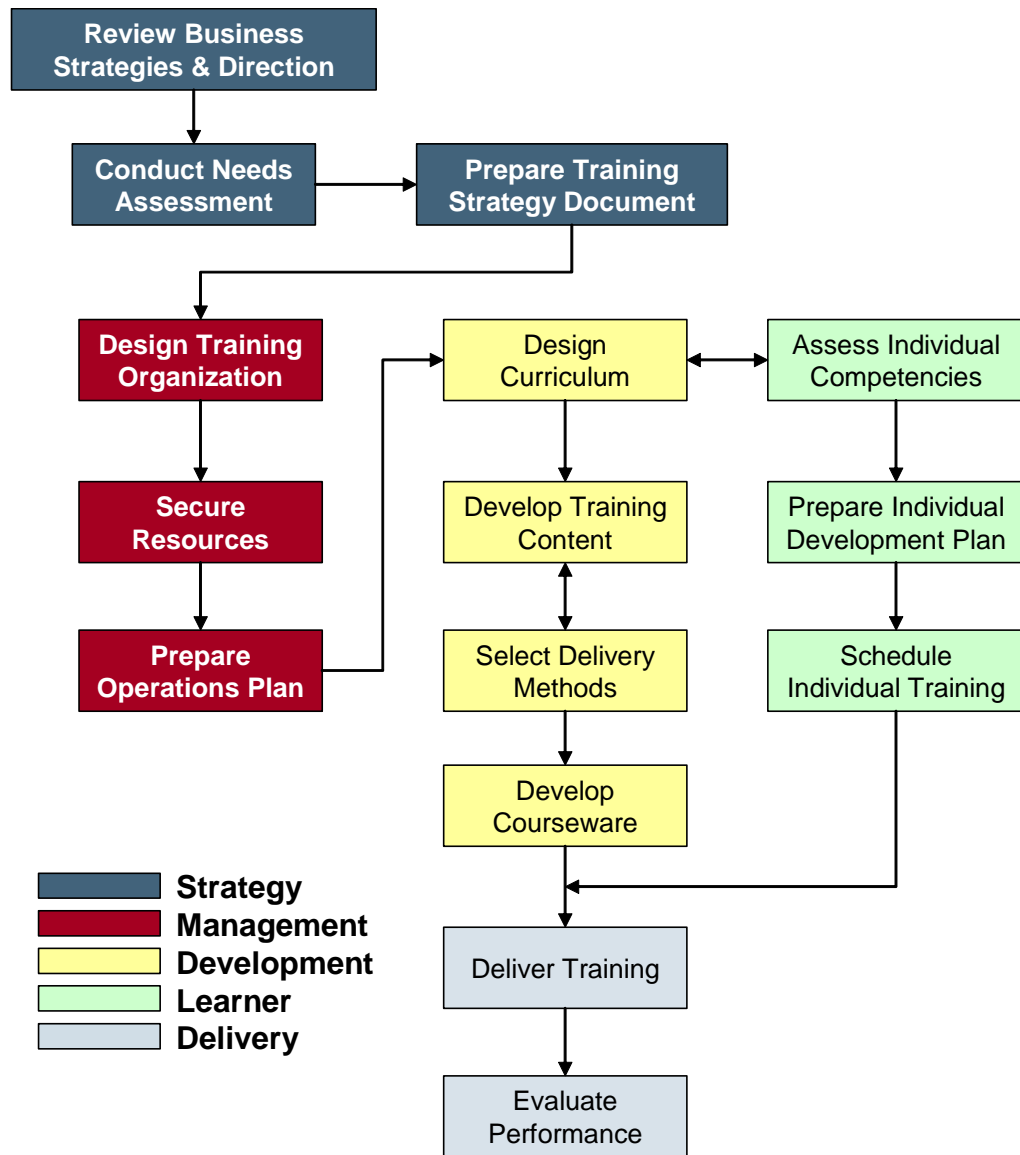
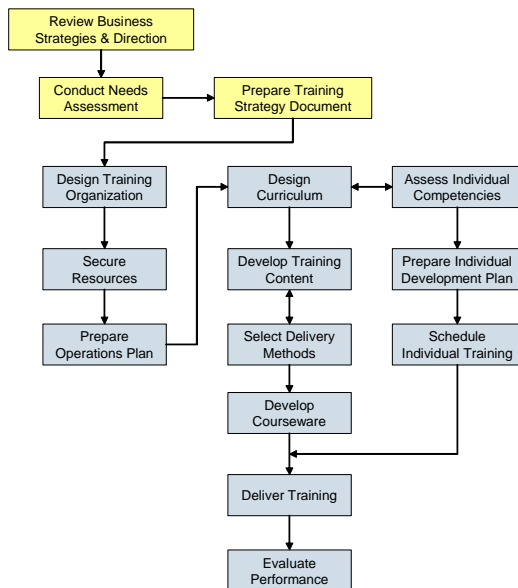


Figure 1 – Training Development Roadmap

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## The strategic perspective

The Strategic Perspective covers the first three activities of the Call Center Training Development Roadmap. These activities provide the necessary foundation for creating an effective training program and organization. The final output will be a Needs Assessment and Training Strategy Document.



### Highlights of activities

#### Review business strategies and direction

- Vision and mission of organization
- Integration plan
- Commission of training group by management
- Budget

#### Conduct needs assessment

- Data gathering methodology
- Summary of needs and requirements

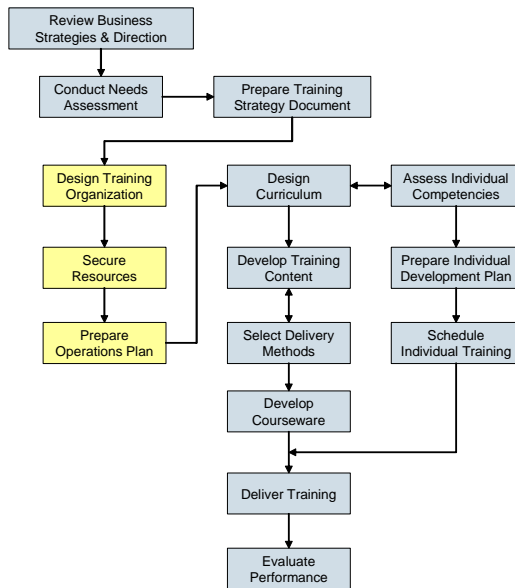
#### Develop training strategy document

- Includes items listed above
- Outsourcing Strategy
- Training organization sizing

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### The management perspective

The management perspective involves how the training organization will be structured and managed. It is the responsibility of the highest-ranking person in training (e.g. VP Training, Training Director, Training Manager) to create the organizational structure and manage the training operation. The activities in this phase of the project will require close coordination with other groups including Human Resources, Information Technology, and Financial/Accounting.



#### Highlights of activities

##### Design training organization

- Organization chart
- Job descriptions
- Budget

##### Secure resources

- Request for personnel
- Outsourcing contracts
- Space planning
- Architectural rough draft
- Equipment list

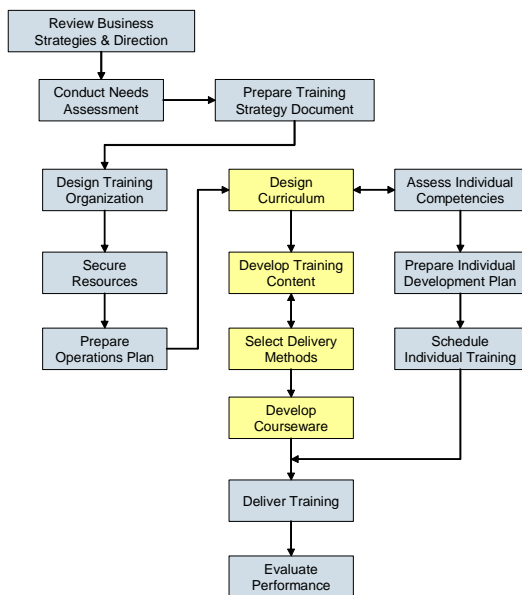
##### Prepare operations plan

- Project timeline
- Roles and responsibilities
- Budget

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## The training perspective

The training perspective includes curriculum and course content development, as well as a determination of your delivery methods. In developing the training perspective, the expertise of training professionals is very important. If you do not have this expertise in-house, you may want to consider looking outside your organization for help with curriculum and course development.



### Highlights of activities

#### Design curriculum

- Curriculum design document
- Curriculum map

#### Develop training content

- Course objectives
- Course descriptions
- Course development

#### Select delivery method

- Research summary
- Cost/benefit analysis
- A/V equipment list

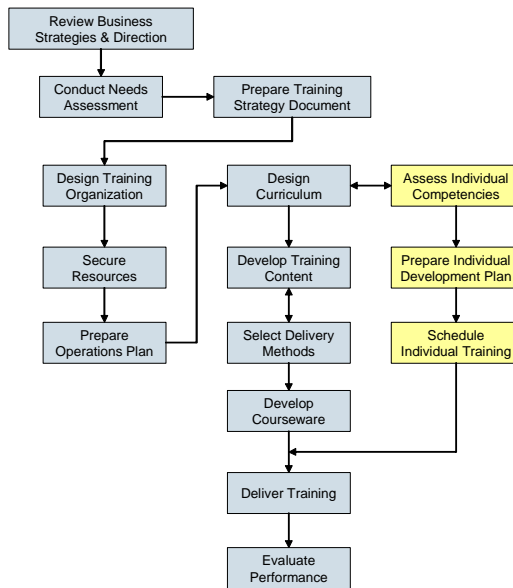
#### Develop courseware

- Training material
- Instructor guides
- Evaluation criteria

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## The learners' perspective

In this phase of the process, you will examine the individual competencies and learning requirements for your call center personnel. This process will give you the input necessary to guide your curriculum development and will provide managers the tools to develop professional development plans for employees in their group.



### Highlights of activities

#### Assess individual competencies

- Competency assessments
- Testing administration procedures
- Test records system

#### Prepare development plans

- Training plan format
- Counseling schedule
- Record system

#### Initiate record keeping

- Records procedures
- Resource request

#### Schedule individual training

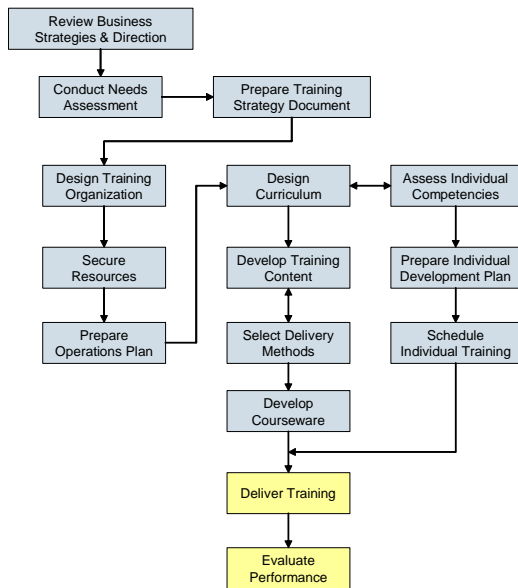
- Training schedule
- Coverage plan

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## The delivery and evaluation perspective

The delivery and evaluation perspective is really the bottom line for any training organization — the ultimate report card. Many trainers compare this perspective to a Broadway show production as they wait for the critics’ reviews. The criteria are simple:

- efficiency (how does actual time and cost performance compare to budget?)
- effectiveness (can the learners perform?)



### Highlights of activities

#### Pilot session

- Pilot feedback report

#### Deliver training

- Training offerings
- Participant evaluation summary
- Follow-up evaluation summary
- On-the-job performance assessment
- Course content revisions
- Financial analysis