



Case Study

Evaluation and Measurement

Client's Business Need

Consolidate regional Call Centers into one centralized location and hire new representatives. Our client needed a new-hire curriculum, leveraging legacy training materials when possible, that ensured new hires would provide excellent service and correct information according to policies to their private banking customers.

- On-the-job certification checklists were prioritized by task frequency. Learners were required to observe each task and perform each task while being observed by a supervisor. Completion of the high-frequency task checklist was required before new hires could take calls independently.

Our Learning Solution

EnVision was engaged to design and manage development of the three-week curriculum. As part of the comprehensive series of courses on customer service, policies and procedures, products, and systems applications, we developed and integrated a robust assessment plan to ensure new hires would meet the client's stringent requirements for working on the phones.

Our solution included the following evaluation-related services and deliverables:

- Course evaluations, which measured learner reaction to each course and the curriculum overall.
- Knowledge assessments to ensure learning occurred; a passing score was required to receive credit.
- Simulation-based assessments that integrated testing customer service; policy, procedure, and product knowledge; and systems use in a realistic, scripted set of scenarios. A roadmap and score sheet assured consistent and objective scoring.

Improved Employee Performance

The client was able to complete hiring for the centralized call center and phase out the regional centers.

- The enhanced curriculum and assessment plan ensured an appropriate level of customer service and job proficiency.

Your Business Needs. Our Learning Solutions. Improved Employee Performance.™