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A Mentor Program to Improve Performance and Retention of Customer Service Representatives

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A MENTOR PROGRAM TO IMPROVE PERFORMANCE

AND RETENTION OF CUSTOMER SERVICE REPRESENTATIVES

by

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ABSTRACT

A Mentor Program to Improve Performance
and Retention of Customer Service Representatives

The purpose of this project was to add an additional tool to supplement classroom training for customer service representatives (CSRs) at a large insurance company. Research has shown that customer service survey results are negatively impacted by a lack of knowledge and experience in CSRs. A mentor program was designed to provide new CSRs with support immediately after completion of formal training, which allows them to gain experience, knowledge and confidence in a protected environment, before joining the customer service unit.

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Chapter 1

INTRODUCTION

The state of the current economy has forced the members of corporate

management teams to examine the factors that retain customers. With all other factors

equal, one way to distinguish a company from the competition is by the provision of

superior customer service. Excellent customer service goes beyond the ability to solve a

problem. The best customer service representatives (CSRs) may prove their value to the

organization through their ability to be the face of the company. They are responsible for

front line public relations, as well as problem solving for the customer who calls for

assistance.

Statement of the Problem

The ability of a CSR to go beyond the provision of a friendly voice on the phone,

to the provision of service worthy of customer satisfaction, is a combination of natural

ability, training, and experience (O'Neill, 2005). Three major areas were identified as

being important factors associated with high customer satisfaction scores at a large health

insurance company (Henderson, Brown, Lee, & Ballesteros, 2009). These areas are: (a)

CSR soft skills such as effective communication and empathy, (b) CSR follow up, and (c)

CSR knowledge. For this researcher's current company, in all cases, the customer

satisfaction ratings reflected the need for improvement. Upon review of the member

satisfaction survey data, CSR knowledge was identified as a grave concern which negatively impacted member customer satisfaction.

Background of the Problem

The Henderson et al. (2009) study results, which were utilized for this work, have been used with permission. However, for the duration of this project, the company for which the study results were utilized will remain anonymous and will be identified only as ABC Insurance Company.

A third party collects the member satisfaction survey data for ABC Insurance Company on a quarterly basis. According to the survey results, gaps within the knowledge base of CSRs prevented the delivery of exceptional service. Management team members reviewed the survey data from fourth quarter 2009 and concluded that it consistently demonstrated that CSR knowledge gaps negatively impacted customer satisfaction (Henderson et al., 2009). It is this writer's view that corporate training should go beyond the classroom and be based on informal learning methodology, such as mentoring and coaching. O'Neill (2005) found that the availability of a mentor is a key component in the overall learning cycle of a well trained CSR.

The customer service manager (Reed, T., personal communication, March 5, 2009) at ABC Insurance Company reported that the current staff includes 350 CSRs, in five nationwide service centers. The average attrition rate for CSRs in 2008 was 9.9%, which is within the industry standard. This turnover rate includes employees who left the company; but it does not include internal transfers, retirees, or loss of staff due to office closures and company layoffs. In each new hire class, approximately one-half of the

participants leave the company prior to completion of the course. According to Reed, it is due to the high turnover rate and the failure of many newly hired CSRs to complete the course that a training class is scheduled in each location every 3-4 months, with a total of approximately 50-100 new CSRs trained per year, as company needs dictate. Although ABC Insurance Company was recently acquired by a larger insurance company, to date, the organizations are not fully merged. Therefore, the statistics quoted herein are specific to ABC Insurance Company alone and not to the larger parent company.

Purpose of the Project

The purpose of this project was to produce two workbooks to be used as tools for a mentor program at ABC Insurance Company. The first workbook is designed to provide guidelines for: (a) identification of the appropriate prospective mentor; (b) the training requirements for a prospective mentor; (c) the time requirements for participation in the mentoring program; as well as (d) a facilitator guide that includes all information in the participant guide, along with key assessment points and milestones for the participant. The second workbook is designed for the customer service protégé. It is designed as a protégé guide and contains: (a) guidelines for mentor program participation, (b) mentor program objectives, (c) protégé assessments, and (d) protégé requirements for program completion.

Chapter Summary

It is this writer's belief that the current training methods at ABC Insurance Company fall short of the goal to educate knowledgeable, well prepared CSRs. The protected environment of a training classroom does not provide sufficient exposure to the

situations and member calls encountered in a typical work day. In order to remain competitive in a marketplace in which customers demand exemplary service, corporate managers and training team members need to provide the requisite guidance and coaching necessary to allow CSR trainees to perform at their highest possible level. In Chapter 2, the Review of Literature, this author introduces information that supports the importance of well prepared coaches or mentors to the professional development of successful corporate employees.

Chapter 2

REVIEW OF LITERATURE

In the current marketplace, each customer demands extraordinary service. The expectation is that the person who handles a customer call is: (a) knowledgeable, (b) courteous, and (c) prompt when questions are answered. An employee who possesses all of the knowledge and attributes necessary to provide that level of service without training is rare; therefore, adequate training is crucial in order to equip CSRs to perform at their highest possible level. The purpose of this project is to help newly trained CSRs gain on the job training in a protected environment, with the assistance and guidance of experienced peer mentors, for the first 3 months after formal classroom training ends. In addition, the project design includes guidelines for mentors to utilize as they advise and guide protégés through their first few weeks as CSRs. The goal of this program is to provide the support and training necessary to allow new CSRs to transition from the classroom to the customer service unit, with the skills and experience they need, in order to handle customer calls in an efficient, effective, and professional manner.

In order to provide the appropriate level of training, often, corporate trainers consider the establishment of mentoring or coaching programs to provide a bridge between the classroom and the customer service unit (Armstrong et al., 2002; Raabe & Beehr, 2003; Viator & Svcandura, 1991; all cited in O'Neill, 2005). If structured appropriately, these mentor/protégé relationships provide staff members and

management, as well as the customers they serve, with a number of benefits (O'Neill).

When the needs of employees are better met, it is less likely that there will be a high

turnover rate. Once the needs of customers are met, they are less likely to complain

about the service received and, also, are less liable to move to a competing company for

insurance needs. The mentoring relationship can prove beneficial to protégés as well as

to mentors. When guidance and assistance is provided, mentors hone their knowledge

base and may experience greater job satisfaction and confidence as a result (Kram &

Isabella, 1985). In this review of literature, the author includes an overview of effective

customer service and its importance to organizations and customers, followed by a

description of effective learning methodologies and an explanation of the benefits of a

mentoring program.

<div align="center">The Importance of Customer Service to Organizations</div>

According to Jeffrey (1995), "Companies committed to superior customer service

make it an overriding concern at all levels in their organizations, and they shape their

values and strategies accordingly" (p. 79). To the caller who contacts a corporation, the

CSRs are the voice of the company. The CSRs are not viewed as an employee of the

company; rather, in the mind of the caller, they are the company. The behaviors

displayed, as well as the answers given, define the way a customer views the company as

a whole (Ukens, 2007). If excellent customer service is provided, the company may earn

a loyal customer. When the opposite is true, however, the poor service received may

motivate customers to take their business elsewhere. Huppertz (2008) pointed to the

reality that, prior to 1996 when the Health Insurance Portability and Accountability Act

(HIPAA) was passed by the federal government, the high cost of switching plans may have been enough of a disincentive to members, that they often stayed with the same insurance carrier for long periods of time. However, with the implementation of HIPAA, some of the deterrents to switching insurance, such as the pre-existing limitation that limited treatment for ongoing medical conditions for the first year of a plan, were removed. This allowed more freedom for health plan members to shop for their insurance plans. The consequential consumer autonomy resulted in higher costs for the health insurance companies, as the marketing staff was forced into stiffer competition in order to retain members. Also, Huppertz (2008) reported that, as a result of this atmosphere of competition, the management teams of health plans have made investments in methods used to measure customer satisfaction. The results from the surveys have been utilized to redesign training programs in an attempt to hone the customer service skills that have been identified as important to customers. It is interesting to note that, according to Hirschman (1970, as cited in Huppertz), a customer who actually voices a complaint is less likely to defect to a competitor than a member who is dissatisfied, yet chooses not to complain to the company.

If the customers' experience is sufficiently unhelpful, also, they may provide negative publicity when they speak of the experience. Bielenberg (2006) described one such consequence of a negative customer service encounter:

> Poor customer service creates unhappy customers. And the more unhappy a customer is, the more likely they are to delay or withhold payment (and in many cases, companies have no idea of the root service issue which is the source of a problem). This, in turn, inflates write-offs and bad debt, and impacts cash flow and working capital – ultimately destroying profits and shareholder value. (p. 2)

The results from the Huppertz (2008) study were comparable. He stated: "Members who complain but do not get their problems resolved will be more likely to defect than members who complain and get their problems resolved by the plan" (p. 390). Conversely, Huppertz found that successful management of a customer's complaint is very lucrative for the company. The results showed that a positive outcome is likely to allow retention of the member as well as prevention of the likelihood that the member will "bad-mouth" (p. 390) the company.

In the atmosphere of a struggling economy, managers may be forced to face more notable competition in the marketplace (Colgate & Danaher, 2000). As a result, a greater focus on the steps necessary to retain customers must be examined. CSRs are on the front lines of the corporation and, are often the only direct contact experienced by a customer. Therefore, the skills displayed by CSRs in the performance of tasks necessary to maintain a high level of customer retention, are crucial to the corporate financial bottom line. This *relationship strategy* is described as central in order to win new customers, as well as for retention of current customers. Also, they reported that there are greater negative effects to organizations when the customer relationship is negative or unsuccessful. In the Anderson, Fornell, and Lehmann study (1994, as cited in Colgate & Danaher, 2000), it was reported that "an annual one point increase in customer satisfaction is worth 11.4 percent of return on investment" (p. 384).

Since the provision of service, which meets the needs of each customer, is of such high importance to the success of any organization, well trained and high performing CSRs are assets to the employer (Ukens, 2007). The appropriate type of training is a

necessity in order to develop employees into CSRs who possess the technical knowledge

necessary to answer questions and solve problems, in addition to the excellent listening

skills necessary to properly address and resolve the caller's needs. The educational

investment made to develop each CSR into that type of asset is time and money well

spent, based on the importance of customer service to the financial well being of the

company.

<center>*What Constitutes Good Customer Service*</center>

According to Jeffrey (1995):

Good service is no accident. Companies committed to superior customer service
make it an overriding concern at all levels in their organizations, and they shape
their values and strategies accordingly. They strive to hire the best employees and
then continuously seek opportunities to motivate them. (p. 79)

The cost of training each CSR is high. Industry experts estimate the cost of training at

between $8,000-10,000. In the Jeffrey survey of 14 organizations, the following list of

six competencies were identified that differentiate providers of high customer service

from those that do not, since they are the most apparent to customers: (a) the skill to

develop customer fidelity and meet their needs, (b) the consistent display of consideration

and compassion, (c) the ability to transmit information efficiently, (d) tolerance and

patience to manage stress, (e) demonstrated ability to listen effectively, and (f) the

knowledge and ability to dispense quick and accurate information. In addition,

respondents indicated the need for proficiency in additional areas such as cooperation,

teamwork, and problem solving; but the first six were identified as the most critical to

successfully serving customers, since they are the most evident to customers. In

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summary, the optimal CSR must be well trained and confident in order to provide the best service to the customer. Without the training, information, knowledge, and skill necessary to perform at the highest possible level, the CSR is unable to provide the level of service each customer demands (Williams, 2007). In order to maintain customer satisfaction, company management staff must place a high value on the preparation of its employees to build strong customer relationship skills. This preparation must include a strong knowledge base, as well as the skills necessary to provide effective customer service.

How to Measure Customer Service Satisfaction

There are a variety of methods for the assessment of customer satisfaction. Customer retention may be one gauge of the effectiveness of the CSR, but a number of other factors may contribute as well (Tam, 2004). This may not be a good indicator of the level of service since, as quality improves across the industry, customers expect a higher level of service. In turn, this may lead to higher competition in the marketplace, as well as less brand loyalty, as customers shop for the best value. Mittal and Lasser's (1998, as cited in Tam) results showed that even contented customers may switch to a rival company in a competitive market. In addition, customer complaints may be an indicator of the level of member dissatisfaction; however, the number of complaints does not indicate that those who do not complain are necessarily satisfied with the service they received (Hsu, Chen, & Hsueh, 2006). Data mining, or the extraction of information through data analysis, is another method to evaluate customer satisfaction that can be utilized. This type of research brings its own set of problems as the researcher strives to

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set the appropriate target level of service necessary to provide customer satisfaction (Garver, 2002; Hsu et al., 2006; Jeffrey, 1995). Hsu et al. purported that customer relationship management (CRM) is one method utilized in order to attain "customer loyalty" (p. 439). They stated, "Knowing what customers value most in a company's products or services helps companies optimize resource utilization in areas for continuous improvement based on their needs and wants" (p. 439).

Recently, the findings from customer satisfaction studies have been utilized as a tool for marketing analysis, as well as a report card for customer service performance (Garver, 2002; Hsu et al., 2006; Jeffrey, 1995). The American Customer Satisfaction Index (ASCI) has been used since 1994 as a measurement for customer satisfaction in the United States (Fornell et al., 1996, as cited in Hsu et al.).

Also, the staff members of independent organizations are utilized by corporations in order to gather customer service satisfaction results. For example, in the Henderson, Brown, Lee, and Ballesteros (2009) study, the data were gathered by The Myers Group (TMG), a survey research firm that specializes in the provision of survey products to the healthcare industry. The survey information was gathered from customer service surveys sent to customers who provided their E-mail address at the end of a customer service encounter. The results from the survey responses were made available to the company and were gathered weekly, monthly, or quarterly, depending on the needs of the requesting manager.

Training Quality Customer Service Representatives

Since CSRs are the front line liaison between the company and customers, the ability to handle questions and provide accurate information in an educated, calm, concise manner is crucial. Ukens (2007) stated, "In the customer's eyes, the people performing the service are the company" (p. 24). In order to provide the necessary level of service, the appropriate type and level of customer service training is critical. Ukens pointed out that there are two important levels of training required: (a) the technical knowledge necessary to answer questions and solve problems, and (b) effective communication skills that build customer rapport and reinforce a positive company image. Arvind and Haque (2008) stated: "Transferring of information from training to the job is meaningless unless an individual learns effectively" (p. 90). Therefore, the importance of knowledge transfer and the most effective method of providing protégé training is crucial to the success of every CSR, and subsequently, their employers (Nkongolo-Bakenda, 2004).

Formal and Informal Learning Methodologies

Formal learning occurs in self-contained learning events that provide information on a specific topic, practice, and testing or assessment (Miner & Hoffman, 2009). This type of education includes: (a) new hire training in a formal classroom setting, (b) courses provided by the corporate training department or outside vendors as needed for new initiatives or refresher training, and (c) ongoing refresher training in response to knowledge or performance gaps that are identified. More often, formal

corporate learning occurs in a blended environment, where a number of modalities are utilized in order to educate the staff members.

According to Miner and Hoffman (2009), informal learning occurs when information is exchanged in casual interactions with people. In a corporate setting, this can include information exchanged in: (a) internal *water cooler* discussions; and (b) electronic exchanges such as E-mail, chat, web meetings, or instant messages. The more motivated individual may engage in self-education through conferences, books, journals, websites, professional associations, or networks. Coaching and mentoring can occur in either an informal or formal environment. Twidale (2005) termed this "over the shoulder learning," or "an informal learning interaction with a colleague…which takes place embedded in a larger (usually workplace) context" (p. 507). This type of relationship based training is produced and delivered by experts as well as peers in the corporate environment. While not always an expert, a peer mentor may aid another employee to obtain information or skills that enhance the ability to do their job. In addition, the mentor can provide psychosocial support in the form of listening, encouragement, or concern that may be necessary to build the confidence of inexperienced employees as they struggle to learn a new job (Bryant & Terborg, 2008).

Recently, a research analyst at the American Society of Training & Development (ASTD; 2008, as cited in Paradise, 2008) surveyed 1,104 human resources and learning professionals. The study findings indicated that, for over one-half of the responding managers, "informal learning occurred to a high (34 percent) to very high (7 percent) extent in their organizations" (p. 53). These results demonstrated an overall growth in the

rate of informal knowledge exchange and, thus, the need for a framework around which it can be utilized. Use of this framework allows learning managers to ascertain the type of information that is shared via informal learning channels and to leverage that information in order to complement the formal learning utilized.

<center>Mentoring and Coaching in a Corporate Environment</center>

There are a number of benefits to mentoring relationships. The definition of mentor comes from Greek mythology, and it is described as a "relationship between a younger adult and an older, more experienced adult [who] helps the younger individual learn to navigate the adult world and the world of work" (Kram & Isabella, 1985, p. 126). In the current corporate environment, the age difference between mentor and protégé may not be apparent or necessary. What is important, however, is the level of experience of the mentor in comparison to the newer employee. In order to ensure that the information passed to a new employee is valid and correct, corporate training team members and managers should work toward identification of the most appropriate and qualified mentors. Kram and Isabella (1985) asserted that mentoring may have a positive influence on the career progression of protégés, as well as for their well being and self-confidence. According to Twidale (2005), the goal of this type of relationship is to "gradually fade the support" (p. 524) until the protégé is able to accomplish the work task without the aid of the mentor. For example, new CSRs without assigned mentors may go to their coworker's desk with a question in regard to how a specific task on the customer service application should be performed, or about where to find the information necessary to answer a caller's question. If the information is received at a coworker's desk, protégés

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may return to their desks and find it difficult to replicate the actions shown or to locate the information received. If help is offered at the protégé's desk by the mentor with guidance through the steps necessary to accomplish the stated goal, the protégé is more likely to be able to replicate that action when the situation presents itself in the future (Twidale).

The Mentoring Relationship

Ensher et al. (2001, as cited in Bryant & Terborg, 2008) described peer mentoring as "an intentional one-on-one relationship between employees at the same or similar lateral level in the firm that involves a more experienced employee providing support and teaching new knowledge and skills to a less experienced employee" (p. 11). Although new employees may be hesitant to ask questions of their managers, they may feel more comfortable doing so in a peer relationship. In a CSR role, an employee is required to possess the knowledge necessary to answer numerous questions, as well as to have the understanding necessary to resolve issues and problems presented by the customer. Swap et al. (2001, as cited in Bryant & Terborg) explained,

> Much of the knowledge that peer mentors possess is tacit and learned from personal experience and from interacting with other employees. Most of the taken-for-granted knowledge of the peer mentor is not recorded in any database, procedure manual, or formal training program. (p. 13)

In addition, formal training can become outdated quickly, since change occurs so rapidly and often in most corporations. The results from the Bryant and Terborg study indicated a strong relationship between the peer mentoring relationship and protégé levels of information sharing. They asserted that the "interpersonal nature of peer mentoring

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provides for the dynamic, continuous creation and sharing of ideas that cannot be replaced by networked computers" (p. 26). Johari and Bradshaw (2007) pointed out that a good mentor plays an important role for the protégé as a social support and encourager. This psychosocial support is important to the newer employee's self-confidence and ability to move forward in his or her level of experience and knowledge.

The type and effectiveness of the support provided by mentors, are impacted by the protégé's locus of control (LOC). LOC, as it relates to learners, was explained by Trice, Epp, Stevens, and Booth (1987) as the difference between those who believe they have control over their educational success, and those who do not. Protégés with internal LOC believe that they directly impacts their own learning and opportunities; while protégés with external LOC believe the opposite. Persons with external locus of control believe that there are factors out of one's control, which dictate educational success. Therefore, generally, protégés with internal LOC display better study skills and overall success, in comparison to those who display external LOC (Nordstrom & Segrist, 2009).

Scheier and Carver (1987) compared the difference between internal and external LOC to the traits of optimism and pessimism. Optimism has been compared to internal LOC, in that, both are associated with: (a) high self-esteem (Fisher & Leitenberg, 1986); (b) lower levels of depression, as well as; (c) better physical health (Scheier & Carver, 1987). Along with an optimistic life view, they often have a higher expectancy of personal success. In contrast, persons with low self-esteem are less likely to accept constructive criticism. These individuals are more likely to have an external LOC, or belief that they are not in control of the level of success experienced (Crocker &

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Schwartz, 1985). Persons with higher levels of self-esteem, or internal LOC, are better

able to use a comparison to another person, who acts in the mentor role, when the

comparison is made to one who is more successful (Morse & Gregen, 1970). Arvind and

Haque (2008) contended that the motivation to learn is directly related to LOC. In

addition, persons with internal LOC are more likely to accept feedback in regards to

personal strengths and weaknesses and to take positive steps toward improvement. In

contrast, individuals with external LOC must be given feedback to enhance their self-

images and boost confidence in order to enhance the ability to learn the information

presented and, subsequently, apply it to their jobs.

Self-control, a trait with similar aspects to internal LOC, allows individuals to

display advanced self-knowledge or more positive self-evaluation (Bandura, 1986).

Protégés with external LOC may be more likely to focus on a personal failure or

shortcoming, rather than the incremental successes experienced. In that case, mentors

may be required to provide a higher level of psychosocial support and encouragement

during the mentoring program. In order to match mentors and protégés appropriately,

personality factors such as LOC should be evaluated. In both cases, however, a balance

between the provision of guidance, learning, and psychosocial support is important to the

role of mentor (O'Neill, 2005).

This author has utilized a variety of personality assessment tools which are

available to a corporate learning organization manager (e.g., Myers-Briggs type indicator

[MBTI]; Emergenetics; Kiersey Temperament). Regardless of the assessment utilized,

the results provide information that can be useful to the assessment of the personality

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type of the prospective mentors and protégés, and the ability to pair these individuals effectively.

Benefits of Mentoring Relationships

The roles of both coach and counselor are key to a successful mentor/protégé relationship. Once a relationship is established, and an appropriate level of trust and comfort is experienced in the relationship, protégés may share new expertise and knowledge with their mentors (Wink & Putney, 2002, as cited in Grove, O'Dell, & Strudler, 2009). This experience was described as "reciprocal mentoring" (p. 90), which can bring helpful information from the protégés' prior experience to the organization as well.

In Kram and Isabella's (1985) study on mentoring, a direct correlation was found between newly hired employees' perceived well being and advancement in their careers. With the encouragement of mentor or coach, an employee is more likely to experience work success, which can lead to greater job satisfaction. Employees who experience greater job satisfaction and self-esteem are better able to handle the stressors of front line customer service jobs for improved personal performance.

In an organized mentoring program, the one on one relationship ensures that specific skills are learned, practiced, and mastered, as observed and documented by mentors. This ensures that proficiency is attained before the new CSRs move on to learn the next, more advanced skill (Jeffrey, 1995). This progressive development allows a gradual acquisition of information and skill, rather than the *brain dump* experienced in a typical classroom. Since much of the information imparted from mentors to protégés are

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implicit, or learned from personal experience, it may not be recorded in any formal location. Therefore, without the mentor relationship, new employees may be forced to proceed without that knowledge or be required to find out for themselves by trial and error (Bryant & Terborg, 2008). The mentor relationship allows a more efficient transfer of this undocumented knowledge that is important to the success of new employees. The corporate organization benefits from strong mentor to protégé relationships (Kram and Hall (1989), Mullen and Noe (1999), Viator and Scandura (1991), and Wilson and Elman (1990, all cited in O'Neill, 2005). O'Neill further explained that, if the relationship results in better company wide knowledge, the returns may be "competitive advantage, strategic functioning, employee motivation, better job performance, and executive development and retention" (p. 439).

The level of competence necessary to handle the fast paced customer service environment is not developed until after CSRs leave the classroom. To move these new employees directly into the customer service unit from the classroom is, in effect, to place them in jobs for which they have not received adequate preparation (Geber, 1990). The assertion is that, without additional on the job training in a protected environment, with the support of senior staff members, protégés are inadequately prepared for the routine daily tasks of the customer service job. In order to receive an adequate level of preparation, on the job training with a high level of support is required for a period of time. Also, Geber stated: "When they attend traditional training courses, they rarely leave the classroom with any kind of proficiency to perform whatever it is they were

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there to learn" (p. 35). This assertion was echoed by Ukens (2007) in the following

statement:

> In today's service environment, the challenge lies in teaching employees new
> skills, behaviors, and attitudes such as communication, creativity, teamwork,
> initiative, and self-empowerment. If a trainer wants to teach people how to
> interact, she has to show them how, and she can't do that by merely sharing
> information with them. (p. 25)

Since estimates indicate that only 10-20% of the information received in typical

training programs transfers into skills that are utilized in the workplace

(Intergovernmental Studies Program [ISP], 2006), it is important to provide a method for

observation and practice of the necessary expertise outside the classroom. This is

described as "content-to-skill transfer" (p. 3), or when academic information is applied to

proficiency. Dale's (1946, as cited in Chamberlain & Krals, 1993) Cone of Experience

supported this view, and provided knowledge retention rates of 90% for either the

education of others, or for the immediate application of the newly acquired skills to

employees' exact vocations. In addition, the following rates were provided for other

methods of education: (a) lecture, 5%; (b) written material, 10%; (c) audio visual or

video, 20%; (d) a demonstration, 30%; (e) participation in a discussion group, 50%; and

(f) the practice of a new skill in a simulated work environment, 75%. The hands on

practice of newly acquired skills do have a higher rate of retention than other common

classroom presentation methods; however, there is a much higher percentage of retention

when the skills are applied to the actual work situation, or when one presents skills or

information to others. Since a limited number of examples occur within the classroom, it

is important to continue to polish the new skills obtained in formal training in real time

and true to life scenarios. Additionally, this information supports the view that the mentor or coach activities are beneficial to both protégés and mentors.

<div align="center">Chapter Summary</div>

With a well structured mentoring program in place, the resultant positive impacts are present for both the mentor and protégé, as well as for the corporation as a whole (Bryant & Terborg, 2008; Jeffrey, 1995; Kram & Isabella, 1985; O'Neill, 2005). The final goal of this program is well prepared CSRs who are able to meet the needs of their customers while they provide the appropriate level of support and understanding. The informal learning provided by a mentoring relationship will come at little or no departmental cost and will provide an end result that is of great value to the managerial staff and customers. In addition, a secondary benefit will be received by experienced CSRs, who act in the mentor role, through the reinforcement of learning that occurs when they teach, coach, and support newly trained protégés. The final goal of the mentor program is the benefit to the new employees, who are better prepared to present the face of the company in a more positive light when interacting with plan members, when they can demonstrate advanced abilities in the areas of service that are the most important to customer retention.

This review of literature supports the development of a mentoring program. It provides definitions and explanations of the following criterion that support the value of well trained CSRs: (a) the importance of customer service to organizations; (b) the definition of good customer service; (c) assessment of customer satisfaction; (d) the examination of learning methodologies; and (d) benefits of a mentor relationship: The

literature reviewed supports the knowledge transfer provided through demonstration. Ukens (2007) inferred that there are indispensable customer service competencies such as: (a) personal awareness, (b) communication, (c) preparation, (d) problem solving, (e) quality, and (f) teamwork. All of these competencies can be supported and enhanced by the development of a strong mentor to protégé relationship within a structured framework. In Chapter 3, the researcher provides a detailed description of the project, including the: (a) method by which the recommendation for a mentor program was determined, (b) target audience for the project, (c) organization of the project materials, and (d) plan for peer assessment of the project.

Chapter 3

METHOD

This project is intended to address the identified knowledge and experience gaps of new customer service representatives (CSRs) with an organized, standardized mentor program that is designed to serve as a segue between the classroom and the customer service unit. It will allow the new CSR to gain skills and knowledge in a safe environment through "repeated application of knowledge and skills in the work setting after training" (Intergovernmental Studies Program [ISP], 2006), with the support and assistance of an experienced mentor. The scheduled skill and knowledge assessments at 1, 2, and 3 month intervals, are designed to affirm the progression of the new employee through the journey to experienced CSR.

Typically, new CSRs at ABC Insurance Company spend 8 weeks in the classroom, where they receive basic information in regard to: (a) the health care insurance industry; (b) the computer applications central to the job of CSR; (c) how to read and interpret the information found in the system; (d) the required performance level metrics on which their work will be judged; (e) basic human resource information in regard to ABC Insurance Company policies and procedures; and (f) how to interpret and explain the benefits to callers, based on the information in the computer system. Although there are role play exercises interwoven into the educational activities, the

amount of on the job training is limited to a few days in observation of an experienced CSR and call simulation exercises in the classroom. The majority of the education is presented in instructor led training (ILT) format, with little or no blended learning methodology.

The knowledge and experience gaps identified by The Myers Group (TMG) have been attributed, by Henderson, Brown, Lee, and Ballesteros (2009), to the large percentage of new employees who enter the customer service unit on a routine basis. Three major areas were identified by the Six Sigma project team members as pivotal to the receipt of acceptable customer satisfaction scores on the TMG surveys. These areas are: (a) CSR soft skills (e.g., courtesy, ability to give clear explanation and responsiveness); (b) CSR follow up (e.g., return call to the customer, if required); and (c) CSR knowledge, such as the ability to answer questions correctly and solve problems effectively (Henderson et al.).

The premise upon which the Henderson et al. (2009) Customer Service Satisfaction survey recommendation is based includes the establishment of a mentor program for newly hired CSRs in the first 3 months after completion of the 8 week ILT new hire training course. The proposed mentor program is designed to provide a more protected environment in which a new CSR can (a) observe experienced CSRs in their daily work; (b) develop best practices through observation of and coaching by the mentor; and (c) learn to utilize available resources to investigate and answer difficult questions with the support of the mentor.

Target Audience

The target audience for this project is the customer service organization at ABC Insurance Company. Specifically, this audience includes: (a) newly trained CSRs who have completed the required 8 week instructor led classroom training, (b) prospective mentors, and (c) the managers responsible for identifying mentors and matching them appropriately with their assigned CSRs.

Organization of the Project

In Chapter 4, the guiding principles for participation in the mentor program are presented. These guidelines are designed to explain the nature of the mentor/protégé relationship, along with the time and effort required for participation in the program. The goal of this information is to ensure that only those individuals with the appropriate: (a) dedication, (b) training, and (c) aptitude are selected for this program. In addition, the guidelines provide the framework for a successful relationship between mentors and their protégés. Also, a Mentor Guide and Participant Guide are presented. These workbooks are nearly identical in content, in order to allow the mentor and protégé to work through them in their side by side interactions early in the program. The Mentor Guide also contains additional: (a) directions, (b) notes, and (c) suggestions for discussion topics. This extra information provides the mentor with a guide for helping the protégé with items such as best practices and utilization of online resources. Both guides also contain significant space for notes and questions. Since the call observations which comprise a large portion of the mentor program require no interruptions from the observer, all questions and discussion must wait until each call is complete. The notes sections allow

the observers to document their observations and questions in order to collect them for discussion during the allotted time between each call.

If the guidelines and strategies of this mentoring program are followed, after participation in the program, protégés are more likely to succeed in the role as members of the customer service team for ABC Insurance Company. The goal is to provide better prepared CSRs and, in turn, to provide improved service to the customers of ABC Insurance Company.

<div align="center">Peer Assessment Plan</div>

After completion of the workbooks, the author arranged to have the program and workbooks reviewed by individuals within the insurance industry. Three of these individuals are involved in the Six Sigma project upon which the recommendation for a mentoring program was based, and the final reviewer is the manager of Instructional Design at ABC Insurance Company. Each of these individuals were asked to review the workbooks for: (a) appropriate guidelines for identification of prospective mentors, (b) effectiveness of exercises and assessments, and (c) overall quality of the mentor and protégé guides. Their input is discussed in Chapter 5.

<div align="center">Chapter Summary</div>

This project is aimed at improving the learning and retention of customer service skills and overall knowledge, of insurance benefits and plan provisions among newly trained CSRs at ABC Insurance Company. Based upon customer service survey results provided by The Myers Group (TMG, 2009, as cited in Henderson et al.), specific knowledge and skill gaps were identified that are the focus of the mentor program.

Through utilization of the information and guidelines offered in the workbooks, mentors can apply their knowledge appropriately, as they guide the protégés through their first 3 months as CSRs. After program completion, the goal is to produce a staff of fully trained CSRs, who are capable of providing the level of service required by the customers of ABC Insurance Company that is necessary to improve customer service survey results. In addition, this ability to provide a higher level of service successfully allows CSRs to experience a greater level of job satisfaction, which should lead to a higher level of retention of experienced and capable CSRs for ABC Insurance Company.

In Chapter 4, the guidelines for participation in the mentor program are presented, along with the Mentor Guide and Participant Guide. These guidelines and tools are designed to explain the nature of the mentor/protégé relationship, as well as the time and effort required for participation in the program. The goal of this information is to ensure that only those individuals with the appropriate: (a) dedication, (b) training, and (c) aptitude are selected for this program. In addition, the guides provide the framework for a successful relationship between the mentor and protégé. If the guidelines and strategies of this mentor program are followed, after participation in the program, the protégé is more likely to succeed in the role of CSR, as a member of the customer service team for ABC Insurance Company.

Chapter 5

RESULTS

This project includes guidelines and workbooks designed for the 3 month mentor program at ABC Insurance Company. They are presented in a format designed to be conducive to appropriate information flow, as well as for adherence to instructional design principles.

Introduction

The project that follows is divided into three sections: (a) Mentor Program Guidelines, (b) Mentor Program – Mentor Guide, and (c) Mentor Program – Protégé Guide. The Mentor Program Guidelines include: (a) guidelines for identifying the appropriate mentor, (b) an overview of the mentor role, and (c) the Mentor Program Agreement Form. Following the guidelines are the Mentor Guide and Protégé Guide, the workbooks to be used by the participants in the program. The Mentor Guide contains all of the information found in the Protégé Guide, plus additional notes in the margins that are designed to assist the mentors as they discuss important topics with their protégé. Since the CSRs selected for this program may be new to the coaching role, this guide is designed to assist with development of the skills necessary to be an effective mentor. Many of the pages contain blanks for taking notes, since a great deal of the learning that will occur during the mentorship is through observation and discussion. With the

utilization of their workbooks, protégés can document their: (a) questions, (b) answers, (c) and progress, as they work through the first 3 months as CSRs at ABC Insurance Company.

ABC INSURANCE COMPANY
MENTOR PROGRAM GUIDELINES

April, 2009

Version 1.0

Mentor Program Guidelines

Introduction   This document, as well as the accompanying Mentor Guide and Protégé Guide, are designed to direct all participants, including: (a) management and supervisors, (b) potential mentors, and (c) newly trained Customer Service Representatives (CSRs) through the mentor program. The 3 month program occurs immediately following the trainees' release from the 8 week classroom training at ABC Insurance Company.

Customer service survey results have shown that in many cases, customer dissatisfaction can be traced to inadequate preparation and the failure of CSRs to handle questions from members and providers appropriately. A high rate of employee turnover may also contribute to the level of inexperience displayed by CSRs at ABC Insurance Company.

The overall purpose of the mentoring program is:

- Improved customer service survey results, as reported by The Myers Group (TMG);
- A higher level of satisfaction and morale among CSRs;
- Enhancement of the ability of new CSRs to handle calls and meet quality/service metrics; and
- An increase in the retention rate of newly trained CSRs who participate in the program.

Overview   In order to serve as a mentor, senior employees must demonstrate a commitment to the success of the protégé, as part of the day to day duties of their job. Also, this requires cooperation on the part of both the supervisory and management staff members. Although the time commitment required for participation as a mentor can be significant, the stated goal of a well trained and better prepared customer service representative, at the end of the 3 month program, is an incentive to supporting the participation of employees in this program.

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Mentor Role   A mentor is defined by Merriam-Webster dictionary as "a trusted counselor or guide" (2009). In addition, the role of mentor includes the following responsibilities:

- Provide support, encouragement, and guidance.
- Assist the protégé with an understanding of the culture, work contacts, and in-house procedures at ABC Insurance Company.
- Supply information and guidance regarding utilization of available informational resources for problem solving.
- Lead by example, as the protégé observes the job performance and positive approach of the mentor.
- Provide recommendations regarding available tools and resources, such as available self-study materials, that may be useful to the protégé.
- Assist with problem and conflict resolution, as needed.

Although the mentors are senior members of the customer service staff, the expectation is not that they act in the role of supervisor. The mentors do not have the background or authority to take on that responsibility. As the CSRs become more experienced, they should act more independently, depending on their mentors only for confirmation that their actions are correct, rather than for instructions regarding how to proceed.

Mentor Identification   Initially, it is the responsibility of the senior employee's supervisor, to ensure that the prospective mentor is qualified to handle the tasks involved with mentoring.

It is recommended that the prospective mentor take the following web-based training courses prior to beginning the mentorship program:

- Introduction to Coaching - Part 1 ENTFLM 151w
- Introduction to Coaching -Part 2 - The Coaching Process ENTFLM152w
- Introduction to Coaching - Part3 - The coaching session ENTGFLM 153w

Mentor Attributes

In order to provide the appropriate level of support to new CSRs, mentors must display the following attributes:

- Strong work ethic
- Responsible and trustworthy
- Experienced and seasoned performer
- Meets or exceeds all quality and production standards
- Competent to provide feedback and guidance in a positive manner
- Sufficient knowledge to provide correct answers and direct new employee to the appropriate resources
- Ability to coach, support and encourage other employees (if necessary, the prospective mentor may take the xxx personality assessment – at the discretion of the supervisor).
- Willingness to participate fully in the program, in order to provide a positive result for the protégé.
- Confidentiality – mentors must agree to discuss sensitive issues with protégés only, and not to discuss these issues with other employees outside of the mentor relationship (the exception to this rule is necessary discussions with supervisors or managers regarding any human resource issues that arise.)

Mentor Program Guidelines, continued

First Steps

Step	Action
1	Prospective mentor self-enrolls and completes the following web-based training courses (each course requires completion of an assessment with a score of 80% or greater, in order to move on to the next course.): i. Introduction to Coaching - Part 1: Introduction to Coaching ii. Introduction to Coaching - Part 2: The Coaching Process iii. Introduction to Coaching – Part 3: The Coaching Session
2	Prospective mentor meets with supervisor or manager to review the Mentor Program Guidelines (found in the Mentor Guide), and sign the Mentor Program Agreement (Appendix A). During the discussion, the supervisor or manager clearly outlines the expectations, responsibility, and time commitment required for participation as a mentor.
3	Supervisor or manager assigns protégé to mentor.
4	Mentor sets up introductory meeting with protégé.

Mentor Program Guidelines, continued

Time Requirements

First week - Observation:

1. Protégé sits with the mentor as mentor takes calls. The protégé wears a companion headset which allows observation of all calls, and the action taken by the mentor.
2. During the call, the protégé is silent, but takes notes, as needed.
3. 5 to 10 minutes is allowed between calls for questions and discussion.
4. Daily end of day 30 minute debrief with protégé.

Weeks 2 through 4 – Observation (roles reversed):

1. Protégé takes calls, but the mentor wears the companion headset. This allows the mentor to assist, as needed.
2. During calls, the mentor is silent unless a question is asked or the protégé violates HIPAA/ERISA standards. The mentor takes notes for discussion after each call.
3. Five to ten minutes is allowed between calls for discussion and coaching.
4. Mentor meets with their supervisor at the end of each week to provide a status report.

Time Requirements, continued

The time requirements for the mentor and protégé continue below:

Weeks 5-8:

1. Weekly status meeting (mentor and protégé).
2. Mentor is available for questions on a daily basis if needed; however the protégé must schedule all meetings in the online calendar.
3. Managerial status meeting or, if the manager prefers, a status report can be given via E-mail.

Weeks 9-12:

1. Bi-weekly status meetings (mentor and protégé).
2. Twice weekly meetings to go over questions, if needed. The protégé must schedule the meeting in advance, in the online calendar.
3. Managerial status meeting or, if the manager prefers, a status report can be given via E-mail. The frequency of these meetings is at the discretion of the supervisor or manager, as applicable.

At the end of the 3 month mentor program, and upon completion of all program requirements, the mentor provides the final evaluation to the protégé. At this time, the supervisor or manager may elect to have a debrief meeting with the mentor and protégé, before the protégé is moved to the customer service unit.

Note: If, at any time during the course of this program, the mentor identifies retraining needs, the mentor should discuss those concerns with the manager or supervisor, as applicable. If a corrective action plan (CAP) is required, it is the responsibility of the manager to implement the CAP. At that point, the mentor steps aside, and their duties are suspended until the CAP is completed successfully. Once the CAP is complete, the mentorship program may be reinstated, at the manager's discretion. If the protégé is not successful, and leaves ABC Insurance Company, the mentor returns to the customer service unit until another protégé is assigned.

Standards   During the mentor program, the quality and production requirements are established as follows:

Weeks 2 through 4:

1. One formal *hard skills (HS)* training call audit per day. These audits are performed by the Quality Assurance (QA) call audit staff, but do not yet count against your results for performance rating. Hard skills audit criteria includes: (a) ERISA compliance, (b) HIPAA compliance, (c) provision of correct benefits, and (d) answering customer inquiries correctly based on established ABC Insurance Company guidelines.
2. One *soft skills (SS)* training call audit per day. These audits focus on soft skills such as: (a) appropriate tone of voice, and (b) appropriate level of customer assistance.

Weeks 5 through 8:

1. Three random *HS* training call audits per week.
2. Three random *SS* training call audits per week.

Weeks 9 through 12:

1. One random *HS* training call audit per week.
2. One random *SS* training call audit per week.

Note: If, at any time during the mentor program, audit results require either additional audits, a CAP, or retraining, protégés may be required to participate in the applicable program at the managers' discretion. Upon completion of the necessary action, the mentorship program may continue, at the managers' discretion.

Mentor Program Guidelines, continued

Completion   At the end of three months, the formal mentor program ends. If the
mentor and protégé agree, they may continue the mentoring
relationship on an informal basis. At this point, however, time
allowances are no longer provided to either the mentor or protégé.

At the conclusion of the program, a competency assessment is
completed by the protégé, prior to moving to the customer service unit.
If successful completion is not achieved, the supervisor or manager
must determine a corrective action plan, and may continue the mentor
program for a longer period of time. The goal, however, is successful
completion of the mentor program within 3 months after classroom
CSR training.

Mentor Program Agreement

By agreeing to participate in the 3-month mentor program, I agree to adhere to the guidelines of the mentor program as outlined by the mentor guide and discussed with my supervisor.

I understand that this arrangement, while it is a senior role in the department, is not a supervisory position. Therefore, any situations of a human resource nature will be promptly referred to my supervisor or manager for handling.

I agree to the following:

- To take all necessary pre-requisite training courses prior to beginning the mentorship program.

- To display responsibility and accountability, especially while acting in a mentor role. I will lead by example, and provide my protégé with guidance regarding company policies and procedures.

- To provide answers to questions when necessary, however, I understand that my primary responsibility is to lead the protégé to the appropriate sources of information so that they may learn to use resources effectively.

- Confidentiality without exception. I will not discuss my protégé's performance, or conversations of either a formal or casual nature with other employees outside of the mentor relationship. The only exception to this rule is discussion with supervisory staff, if necessary.

- Accountability with my protégé regarding meetings and scheduled activities.

- To follow the program guidelines, to administer assessments as scheduled, and to report those results to supervisory staff.

- To schedule weekly meetings with my supervisor to provide a status report regarding the mentor.

Also, if the protégé's audits reveal error trends, I will inform management so that they can formulate a corrective action plan. If the protégé displays ability and aptitude that is above average, I agree to discuss the possibility of completing the mentorship earlier, in order to move the protégé to the CSR unit ahead of schedule (at the manager's discretion).

Prospective Mentor Signature   **Manager/Supervisor Signature**

Date   **Date**

ABC INSURANCE COMPANY
MENTOR PROGRAM - MENTOR GUIDE

May, 2009
Version 1.0

Mentor Program - Mentor Guide

Introduction If you have been selected to participate in the mentorship program, you should have taken part in evaluation activities and discussions with your supervisory staff. You have signed the confidentiality agreement and are ready to begin.

Thank you for your willingness to participate in this important initiative, designed to improve the experience of new CSRs, and consequently, the customers of ABC Insurance Company.

Ground Rules Your role as a mentor is important to the success of your assigned protégé. As you guide them through their first 3 months as a CSR, your goal is to act as a coach and counselor. You are expected to lead by example, as the protégé learns the job and becomes familiar with the corporate culture of ABC Insurance Company. You will be successful, if you agree to follow these basic ground rules:

1. The mentor/protégé relationship is based on business needs. The goal is not to focus on the personal relationship or differences, but rather to focus on business issues and concerns, as the protégé learns and improves their level of skill as a CSR.

2. The mentor role includes coaching; counseling; advising; and guidance through side-by-side problem-solving, question and answer sessions, and encouragement. While you may have to answer many questions at first, it is important to guide your protégé to the appropriate resource in order to find the answer, rather than merely giving the answer. If the answer determined is wrong, your job is to steer the protégé in the appropriate direction. If the answer is correct, the protégé may need your assurance in order to proceed.

Ground Rules, continued

The basic ground rules for a mentor continue below:

3. Treat the protégé with respect and consideration. Feedback should be clear and honest, and delivered in a positive manner, without judgment or negative personal comments.

4. View questions and differences of opinion as opportunities for discussion and learning, rather than viewing them as personal attacks. Open discussion of these points will further enhance your business relationship and the learning process for the protégé. Confidentiality is crucial to the mentor/protégé relationship. Without honesty, accountability, and confidentiality, a mentor cannot truly coach and counsel effectively. You must agree to honesty and integrity within the mentor/protégé relationship. If you are unable to answer a protégé question, state that you are unable to respond, and agree to help the protégé find the correct information, rather than to manufacture another answer. This is key to maintaining credibility with your protégé.

5. Do not attempt to handle issues of a human resources nature (inappropriate behavior). If you encounter a situation that requires the intervention of a supervisor or manager, request a private meeting with your supervisor and explain the situation. The supervisor has the experience and authority to handle these situations, and will take the appropriate action, as needed. The mentor role is not a supervisory role. While the mentor is a senior member of the customer service staff, the position does not carry authority or responsibility that is on par with a supervisor.

Time Requirements

The mentor program entails time commitments, as outlined in the program guidelines. It is your responsibility to lead by example, and make appropriate use of the time allotted between calls, and during meetings.

Observation
As a mentor, you will spend a great deal of time with your protégé. Your manager may ask you to take extra measures, as necessary, to ensure the success of your protégé. These extra steps may be part of a corrective action plan for a protégé who may be struggling with audit results, for example.

If, at any time during the mentor program, you observe behavior or work issues that indicate that the protégé is not a good fit for the CSR position, document the specifics and discuss your concerns with the supervisor. It is important that any issues identified during the mentorship program are handled prior to moving a new CSR to the unit. Remember, confidentiality is an important responsibility in any situation. Do not discuss your protégé with other employees, other than your supervisor or manager.

Protégé Guide
The following pages contain the same information found in the Protégé Guide. They also include: (a) the answers for any activities found in the protégé guide (b) space for your notes, as needed, and (c) mentor notes in the left margin, designed to provide helpful reminders and other information as you guide your protégé through the mentorship program.

This guide is for your use, as you provide guidance to your protégé, over the next three months. Take notes as needed, in order to: (a) provide feedback to your supervisor regarding the protégé's progress, (b) make note of questions that require research before reporting back to the protégé, or (c) record information and insights you gain as you work through this program. Upon completion of the program, this guide is yours to use for future reference, as needed. You will be expected to provide a post-mentorship evaluation, but the mentor guide is yours to keep.

Introduction

Mentor Note: This is the introduction found in the **Protégé Guide.** Allow a few minutes to discuss this information the first day.

Congratulations! You have progressed from the classroom to the first phase of your journey, to become a fully trained and capable CSR for ABC Insurance Company.

Over the next 3 months, you will work through many problems, as you prepare to handle calls and questions independently. Your mentor is available for assistance, however, the responsibility for your progression is yours. While your mentor is a senior member of the CSR staff, the expectation is not that they should lead you, but rather, that they walk beside you during your mentor program.

Ground Rules

Mentor Note: These are the ground rules found in the Protégé Guide.

Give your protégé the opportunity to ask any questions before starting to take calls on their first day.

If you do not have the necessary answers, write the question down, and report back to your protégé tomorrow.

Your role in the program is to follow the example of your mentor as they provide coaching during your first few weeks at ABC Insurance Company. Your success is ensured if you agree to follow these basic ground rules:

1. Participate in the program with the understanding that the onus for improvement is yours, and is not the responsibility of your mentor.
2. You agree to complete confidentiality in discussions with your mentor. Your mentor is a senior member of the CSR staff, but is not your supervisor. For issues of a human resources nature, such as absences, paid time off, etc., consult your supervisor.
3. You must be completely accountable, and to: (a) arrive at meetings as arranged; (b) keep your mentor appraised of problems or issues, and (c) utilize the time spent with your mentor efficiently.
4. Complete all activities as assigned, and work toward completion of your mentor program within the 3 months allotted.
5. Prepare your questions by keeping detailed notes, in order to make efficient use of your mentor's time. There are notes pages available in your Protégé Guide that may be used for this purpose.
6. Schedule meetings with your mentor in advance, using your online calendar. This allows both of you to plan ahead, and make the most efficient use of your time.

Ground Rules, continued

The ground rules for the protégé continue below.

 7. Work toward meeting or exceeding all quality and production standards, in order to progress during your first few weeks as a CSR.

Protégé Guide

The following pages contain space for your notes, as needed. This guide is for your use, so feel free to make notes as you work through the program together with your mentor.

Mentor Note: Take a few minutes to discuss the fact that the majority of this mentor program is "hands on" and self-study through observation; therefore, the guide contains little information, and a great deal of room for notes and observations. There are suggested topics for notes in some cases, but the notes section for each day are for the protégé to use, at their discretion, and as needs dictate.

Week 1/Day 1

Mentor Note: Take a few minutes to make sure your protégé understands how the headset works, before logging into the system today.

Reiterate the importance of saving questions/comments until after the call is complete.

The protégé needs to understand that they must not interrupt you during a customer call.

Today, and for the rest of this first week post-training, you will observe your mentor as they take calls. Your headset allows you to observe your mentor's actions in the Customer Service application in the customer service system, and to hear both sides of the conversation. It does not allow you to participate in the call.

Before logging into the system, your mentor will go over your scheduled breaks and lunch time. Since you are working in tandem, during the mentorship, your breaks and lunches will be at the same time.

Pay close attention to the methods used by your mentor to (a) document all necessary plan information in the system, (b) investigate and answer questions, and (c) provide the highest level of customer service possible in each situation.

You will have 5-10 minutes between each call for questions and discussion. Use the notes section on the bottom half of this page to note your questions.

Important Note: Do not attempt to interrupt your mentor, or engage them in conversation during a customer service call. Your only role is to observe their actions. Questions must be saved until each call is complete.

Today I observed:

Day 1,
continued

The notes section below is for important reminders or questions for discussion between calls.

Today I observed:

_____

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_____

_____

_____

_____

Important notes:

_____

_____

_____

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Day 2

Mentor Note: A good habit to establish is to start the day with concerns and questions before logging into the system to take calls.

This also sets the example of organizing one's thoughts and desk before logging on each day.

Reinforcing these good work habits by example is a "best practice" to highlight as a mentor.

Today is the second day of observation. Remember, your headset allows you to observe your mentor's actions in the customer service system, and to hear both sides of the conversation. It does not allow you to participate in the call.

Use the 5-10 minutes between each call for questions and discussion. The notes section on the bottom half of this page is available for your use.

Reminder: Do not attempt to interrupt your mentor, or engage in conversation during a customer service call. Your only role is to observe and learn. Questions must be saved until each call is complete.

Important notes: _____

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_____

_____

_____

_____

Today's most challenging call: _____

_____

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_____

_____

_____

Day 2,
continued

Today I observed: _____

_____

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Important notes: _____

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Day 3

Today is the third day of observation. By now, you should be used to listening quietly as your mentor handles the customer service calls.

Mentor Note: Since we're asking the protégé to focus on hard skills this week, be sure to remind them of the First Call Resolution competency, and the Personalized Support component of the Customer Service Quality Program at ABC Insurance Company.

If you have time this week, take a few minutes to answer any questions regarding the quality program, and how best to meet the necessary metrics, as part of the responsibility to provide excellent customer service.

Use the 5-10 minutes between each call for questions and discussion. The notes section on the bottom half of this page is available for your use.

Reminder: Do not attempt to interrupt your mentor, or engage them in conversation during a customer service call. Your only role is to observe the mentor's actions. Questions must be saved until each call is complete.

Today, you may want to focus on the hard skills portion of each call.

- Observe the mentor as information is documented in the system.
- Listen to the presentation of information and observe the performance of all steps necessary in order for ABC Insurance company to be HIPAA compliant, and to present the appeal rights of the member under ERISA.

Mentor Program - Mentor Guide, continued

Day 3,
continued

Today I observed:_____

_____

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Important notes: _____

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Day 4

Mentor Note:
Today, as you discuss customer service, focus on the soft skills necessary to provide solid customer service. If necessary, review the *SS* program guidelines with your protégé. They have been introduced to them in training, but now that the protégé sees these skills in practice, they may have additional questions.

Since you are nearing the end of your first week of observation as the mentor takes calls, pay special attention to the topics you feel will be difficult for you when you are providing customer service.
Beginning on the first day of next week, you will be handling the overall customer service while observed by your mentor. Although your mentor can assist as needed, the primary responsibility for the call and all necessary documentation is yours.

Today I observed:

Important notes:

Day 5

Mentor Note:
Make sure your protégé understands the QA audit process, and how those audit results impact their job, their potential for advancement, and their overall career path at ABC Insurance Company.

As you think about next week, use your discussion time to ask any outstanding questions and prepare to take calls. Remember, although your mentor can assist as needed, the primary responsibility for the call and all necessary documentation is yours.

Beginning next week, you will be subject to Quality Assurance (QA) hard skills (HS) training audits, and Soft Skills (SA) audits. At the beginning of each week, your mentor will discuss the results of those audits with you. These audits ensure that the customer service staff is in compliance with ABC Insurance Company performance standards.

This week's most challenging call was: _____

Outstanding questions for my protégé: _____

Week 2/Day 6

Mentor Note: You may want to start your day with a short pep talk. If you can allay some of the initial nervousness, your protégé may approach the first call with more confidence.

Depending on the personality type of your protégé, they may need encouragement during the call in the form of hand signals (thumbs up), or nodding.

Be aware of your body language. A frown or wrinkled brow may send the wrong message to the new CSR. Make sure your eyes and face communication the message you intend to send.

Today, you are in the driver's seat! You may feel nervous and apprehensive as you begin to take calls. Relax! Your mentor is not listening to your calls to judge or criticize. Rather, his or her purpose is to assist you as you hone your skills and knowledge in preparation for your role as a fully trained CSR at ABC Insurance Company.

The notes pages for days 7-14 should be utilized during your discussion between calls. During these discussions, your mentor will answer outstanding questions and provide feedback designed to help you improve your customer service skills.

Today I observed:_____

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Important notes: _____

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Day 7   **Today I observed:**_____

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Important notes: _____

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Day 8

Today I observed:_____

Mentor Note:
Remember to temper less positive feedback with encouragement.

This week, you will go over the first set of audit results with your protégé.

Depending on those results, the supervisor may wish to have that discussion with your protégé and/or request some focused retraining.

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Important notes: _____

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Day 9

Today I observed:_____

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Important notes: _____

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Day 10

Today marks the end of your first week taking calls. Congratulations!

Before you log on today, take a few minutes to discuss your progress with your mentor. Use the notes section below to take notes regarding (a) areas in which you did well, (b) areas in which you need improvement, and (c) any outstanding questions for your mentor. Take pride in your accomplishments, and resolve to work hard to improve any problem areas indicated by your mentor.

What my protégé did well: _____

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What could improve: _____

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Week 3/Day 11

Mentor Note: The second set of weekly audits should be available for review today.

As you did last week, go over those results with the protégé, and discuss a plan of action for improvement in any error trends identified. Your protégé may have questions that you need to refer to the supervisor.

During today's first debrief with your mentor, focus on one area in which you would like to have additional help, such as diffusing anger or handling an appeal, for example. Your goal this week is to continue to improve your ability to utilize the online reference materials and the claim history in the Facets system to answer questions and provide stellar customer service.

Today I observed: _____

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Important notes: _____

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Day 12   **Today I observed:**_____

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Important notes: _____

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Day 13   **Today I observed:**_____

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Important notes: _____

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Day 14

Mentor Note: If there is time today, feed your protégé random topics, and have them practice looking up that information in the online resource manual.

As time allows, have your mentor give you random topics to investigate, and keep track of the time it takes you to look them up in the online resource manual. Try to improve the ease by which you look up information.

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Day 15

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Week 4/Day 16

Mentor Note: Since this is the beginning of week 4, there should be audit results to discuss with your protégé today.

Look for error trends between the audits for the past two weeks and the current results.

Provide guidance and recommendations for information the protégé can review, if needed.

Day 17

Day 18

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Day 19   You are almost to the end of the first month as a CSR! Beginning
next week, you will work more independently. Both you and your
mentor will take calls independently.

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Day 20

Mentor Note: The first assessment is based upon your observation of the ability of your protégé to handle a randomly selected call effectively.

Think back to any error trends identified in the audits, and focus on identifying areas in which improvement should have occurred, but did not. Ask your supervisor for assistance, if necessary.

You have made it through the first 4 weeks as a CSR! Providing you pass the assessment this week, you will move on to the next phase of the mentorship program. Congratulations! This is the first milestone in your journey to becoming a fully trained CSR.

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Week 5

Mentor Note:
During their first few weeks as CSRs, protégés may have already received *TipS* in their in-box upon logging in to the system.

This would be a good time to reiterate the importance of the information communicated via *TipS*, and their responsibility for the information they receive in this manner.

Best practice is to set aside a few minutes each day to review *TipS* and new information in the online reference manual.

On average, a CSR should only receive 1 or 2 each week, but it's easy to let *TipS* pile up and become unmanageable.

Best practice is to review Qs daily if they arrive, and not save them for later.

You are at the beginning of week 5. If you have not already done so, set up your weekly meeting with your mentor. We recommend that you set the meeting for Thursday or Friday, when call volumes are lower.

You have spent the past few weeks side by side with your mentor, honing the skills learned in training. You are well prepared to handle the calls that you will begin receiving as soon as you log in to the system today. Good luck!

Week 5 - Questions for my mentor: _____

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Week 6   **Week 6 - Questions for my mentor:**

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Week 7   This week, before your regular meeting, send an agenda to your
             mentor with questions or topics of discussion.

             Week 7 – Meeting agenda:

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Week 8

Mentor Note: The second assessment needs to be administered sometime this week, preferably on Thursday or Friday. Take a minute to schedule that time now.

As with the prior assessment, observe a randomly selected call. There should be observed improvement in both soft skills and hard skills performance since the prior assessment.

At the end of week 8, you move into the last phase of the mentor program. At the end of this week, you will have a short assessment. After successful completion, you will move into an even more independent role, as preparation for moving to the CSR unit.

Week 8 - Questions for my protégé: _____

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Week 9	During this last phase of the mentorship program, you will only meet with your mentor in weeks 10 and 12. If necessary, you can send questions to your mentor via E-mail. It is recommended that you utilize the online resource manual and customer history to attempt to answer all questions yourself, however. If you need assistance, it is best to send your question along with the possible answer you found with your research. Your mentor can advise regarding whether your research led you to the right answer, or he or she will provide the location of the correct answer. The goal is to become a fully trained, independent CSR. There is no scheduled meeting with your mentor this week.
Week 10	Upon logging into the system on Monday of this week, set up a meeting for Thursday or Friday with your mentor. Be sure to document any outstanding issues or questions and present them at this meeting.
Week 11	There is no scheduled meeting with your mentor this week.
Week 12 **Mentor Note:** Administer the final assessment this week. Observe a randomly selected call. Since you have been doing regular observation, as well as reviewing the audit results regularly with your protégé, there should be no big surprises in this final assessment. Use this opportunity to reinforce best practices.	Unless you have progressed faster than scheduled, or have had to participate in additional retraining, this is your last week in the mentorship program. Take a minute to schedule your final meeting with your mentor at the end of this week. This week, you will have a final assessment, consisting of review of a randomly selected call by your mentor. You will also have a debrief with your new supervisor prior to moving to the customer service unit. Make note of any final clarifications you require and make preparations to move. Your mentor will advise regarding those arrangements. Welcome to the customer service unit of ABC Insurance Company, and congratulations on a job well done!

ABC INSURANCE COMPANY
MENTOR PROGRAM - PROTÉGÉ GUIDE

April, 2009
Version 1.0

Mentor Program – Protégé Guide

Introduction   Congratulations! You have progressed from the classroom to the first phase of your journey, to become a fully trained and capable CSR for ABC Insurance Company.

Over the next 3 months, you will work through many problems, as you prepare to handle calls and questions independently. Your mentor is available for assistance, however, the responsibility for your progression is yours. While your mentor is a senior member of the CSR staff, the expectation is not that they should lead you, but rather, that they walk beside you during your mentor program.

Ground Rules   Your role in the program is to follow the example of your mentor as they provide coaching during your first few weeks at ABC Insurance Company. Your success is ensured if you agree to follow these basic ground rules:

1. Participate in the program with the understanding that the onus for improvement is yours, and is not the responsibility of your mentor.
2. You agree to complete confidentiality in discussions with your mentor. Your mentor is a senior member of the CSR staff, but is not your supervisor. For issues of a human resources nature, such as absences, paid time off, etc., consult your supervisor.
3. You must be completely accountable, and to: (a) arrive at meetings as arranged; (b) keep your mentor appraised of problems or issues, and (c) utilize the time spent with your mentor efficiently.
4. Complete all activities as assigned, and work toward completion of your mentor program within the 3 months allotted.
5. Prepare your questions by keeping detailed notes, in order to make efficient use of your mentor's time. There are notes pages available in your Protégé Guide that may be used for this purpose.
6. Schedule meetings with your mentor in advance, using your online calendar. This allows both of you to plan ahead, and make the most efficient use of your time.

Mentor Program – Protégé Guide, continued

Ground Rules,   The ground rules for the protégé continue below.
continued

1. Prepare your questions by keeping detailed notes, in order to make efficient use of your mentor's time. There are notes pages available in your Protégé Guide that may be used for this purpose.
2. Schedule meetings with your mentor in advance, using your Outlook calendar. This allows both of you to plan ahead, and make the most efficient use of your time.
3. Work toward meeting or exceeding all quality and production standards, in order to progress during your first few weeks as a CSR.

Protégé Guide   The following pages contain activities to be completed during your mentorship program, along with space for your notes, as needed. This guide is for your use, so feel free to make notes as needed as you work through the program together with your mentor.

Mentor Program – Protégé Guide, continued

Day 1

Today, and for the rest of this first week post-training, you will observe your mentor as they take calls. Your headset allows you to observe your mentor's actions in the Customer Service application in the customer service system, and to hear both sides of the conversation. It does not allow you to participate in the call.

Before logging into the system, your mentor will go over your scheduled breaks and lunch time. Since you are working in tandem, during the mentorship, your breaks and lunches will be at the same time.

Pay close attention to the methods used by your mentor to (a) document all necessary plan information in the system, (b) investigate and answer questions, and (c) provide the highest level of customer service possible in each situation.

You will have 5-10 minutes between each call for questions and discussion. Use the notes section on the bottom half of this page to note your questions.

Important Note: Do not attempt to interrupt your mentor, or engage them in conversation during a customer service call. Your only role is to observe their actions. Questions must be saved until each call is complete.

Today I observed:_____

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Mentor Program – Protégé Guide, continued

Day 1,
continued

The notes section below is for important reminders or questions for discussion between calls.

Today I observed:_____

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Important questions: _____

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Mentor Program – Protégé Guide, continued

Day 2

Today is the second day of observation. Remember, your headset allows you to observe your mentor's actions in the Customer Service application in Facets (ABC Insurance Company system), and to hear both sides of the conversation. It does not allow you to participate in the call.

Use the 5-10 minutes between each call for questions and discussion. The notes section on the bottom half of this page is available for your use.

Reminder: Do not attempt to interrupt your mentor, or engage in conversation during a customer service call. Your only role is to observe his or her actions. Questions must be saved until each call is complete.

Important questions: _____

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Today's most challenging call: _____

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Mentor Program – Protégé Guide, continued

Day 2,
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Today I observed:_____

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Important questions: _____

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Day 3

Today is the third day of observation. By now, you should be used to listening quietly as your mentor handles the customer service calls.

Use the 5-10 minutes between each call for questions and discussion. The notes section on the bottom half of this page is available for your use.

Reminder: Do not attempt to interrupt your mentor, or engage them in conversation during a customer service call. Your only role is to observe the mentor's actions. Questions must be saved until each call is complete.

Today, you may want to focus on the hard skills portion of each call.

- Observe the mentor as information is documented in the system.
- Listen to the presentation of information and observe the performance of all steps necessary in order for ABC Insurance company to be HIPAA compliant, and to present the appeal rights of the member under ERISA.

Day 3,
continued

Today I
observed:_____

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Important questions: _____

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Mentor Program – Protégé Guide, continued

Day 4   Since you are nearing the end of your first week of observation as the
            mentor takes calls, pay special attention to the topics you feel will be
            difficult for you when you are providing customer service.
            Beginning on the first day of next week, you will be handling the
            overall customer service while observed by your mentor. Although
            your mentor can assist as needed, the primary responsibility for the
            call and all necessary documentation is yours.

            Today I observed:_____

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            Important questions: _____

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Day 5

As you prepare to take calls next week, use your discussion time to ask any outstanding questions and prepare to take calls. Remember, although your mentor can assist as needed, the primary responsibility for the call and all necessary documentation is yours.

Beginning next week, you will be subject to Quality Assurance compliance audits, and Behavior Analytics soft skills audits. At the beginning of each week, your mentor will discuss the results of those audits with you. These audits ensure that the customer service staff is in compliance with ABC Insurance Company performance standards.

This week's most challenging call was: _____

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Outstanding questions for my mentor: _____

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Week 2/Day 6   Today, you are in the driver's seat! You may feel nervous and apprehensive as you begin to take calls. Relax! Your mentor is not listening to your calls to judge or criticize. Rather, his or her purpose is to assist you as you hone your skills and knowledge in preparation for your role as a fully trained CSR at ABC Insurance Company.

The notes pages for days 7-14 should be utilized during your discussion between calls. During these discussions, your mentor will answer outstanding questions and provide feedback designed to help you improve your customer service skills.

Today I observed:_____

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Important questions: _____

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Mentor Program – Protégé Guide, continued

Day 7   **Today I observed**:_____

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Important questions: _____

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Day 8   **Today I observed**:_____

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Important questions: _____

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Day 9   **Today I observed**:_____

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Important questions: _____

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Day 10

Today marks the end of your first week taking calls. Congratulations!

Before you log on today, take a few minutes to discuss your progress with your mentor. Use the notes section below to take notes regarding (a) areas in which you did well, (b) areas in which you need improvement, and (c) any outstanding questions for your mentor. Take pride in your accomplishments, and resolve to work hard to improve any problem areas indicated by your mentor.

What I did well: _____

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What I could improve: _____

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My plan for improvement: _____

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Week 3/Day 11

During today's first debrief with your mentor, focus on one area in which you would like to have additional help, such as diffusing anger or handling an appeal, for example. Your goal this week is to continue to improve your ability to utilize the online reference materials and the claim history in the Facets system to answer questions and provide stellar customer service.

Today I observed: _____

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Important questions: _____

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Day 12   **Today I observed**:_____

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Important questions: _____

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Day 13   **Today I observed**:_____

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Important questions: _____

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Day 14   As time allows, have your mentor give you random topics to investigate, and keep track of the time it takes you to look them up in The online resource manual. Try to improve the ease by which you look up information.

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Day 15

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Week 4/Day 16

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Day 17

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Day 18

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Day 19   You are almost to the end of the first month as a CSR! Beginning next week, you will work more independently. Both you and your mentor will take calls independently.

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Day 20   You have made it through the first 4 weeks as a CSR! Providing you pass the assessment for this week, you will move on to the next phase of the mentorship program. Congratulations! This is the first milestone in your journey to becoming a fully trained CSR.

Week 5

You are at the beginning of week 5. If you have not already done so, set up your weekly meeting with your mentor. We recommend that you set the meeting for Thursday or Friday, when call volumes are lower.

You have spent the past few weeks side by side with your mentor, honing the skills learned in training. You are well prepared to handle the calls that you will begin receiving as soon as you log in to the system today. Good luck!

Week 5 - Questions for my mentor:

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Week 6   **Week 6 - Questions for my mentor:**

Week 7   This week, before your regular meeting, send an agenda to your
mentor with questions or topics of discussion.

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Week 7 – Meeting agenda:

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Week 8

At the end of week 8, you move into the last phase of the mentor program. At the end of this week, you will have a short assessment. After successful completion, you will move into an even more independent role, as preparation for moving to the CSR unit.

Week 8 - Questions for my mentor:

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Week 9	During this last phase of the mentorship program, you will only meet with your mentor in weeks 10 and 12. If necessary, you can send questions to your mentor via E-mail. It is recommended that you utilize the online resource manual and the customer's history to attempt to answer all questions yourself, however. If you need assistance, it is best to send your question along with the possible answer you found with your research. Your mentor can advise regarding whether your research led you to the right answer, or he or she will provide the location of the correct answer. The goal is to become a fully trained, independent CSR.

There is no scheduled meeting with your mentor this week. |
Week 10	Before logging into the system on Monday of this week, set up a meeting on Thursday or Friday with your mentor. Be sure to document any outstanding issues or questions and present them at this meeting.
Week 11	There is no scheduled meeting with your mentor this week.
Week 12	Unless you have progressed faster than scheduled, this is your last week in the mentorship program. Take a minute to schedule your final meeting with your mentor at the end of this week. You will have a final assessment, and a debrief with your new supervisor prior to moving to the customer service unit. Make note of any final clarification you require and make final preparations to move. Your mentor will advise regarding those arrangements. Congratulations on a job well done!

Chapter Summary

All materials presented in this chapter were designed to support the development of a strong business partnership between mentors and protégés during this 3 month program. Success of the program depends on the selection of the appropriate candidates for the mentor role. Although guidelines are given regarding the method by which these candidates should be selected, the final decision is that of the managerial staff. Therefore, depending on business needs, less suitable employees may be placed in that role. However, the pre-requisite web-based training (WBT) courses selected for this program are designed to fill the gap in this situation, or to reinforce the appropriate skills of well-suited candidates.

The Mentor Program Guidelines, Mentor Guide, and Protégé Guide are all designed to work in concert to ensure a successful mentor program. If used appropriately, they should prove helpful to providing the necessary additional support during the first 3 months after formal training, to ensure successful, well prepared CSRs. As a result, they should be able to provide more successful customer experiences for callers to ABC Insurance Company.

Chapter 5

DISCUSSION

Contribution of the Project

The need for customer service that satisfies the needs of every caller, is a problem

encountered by many businesses, daily. The fact that in most cases, callers present issues

or problems upon calling, causes incidents to begin on a negative note. Even the most

skilled customer service representatives (CSRs) may have difficulty assisting some

callers with their stated problems, depending on callers' personalities and levels of

reason. Therefore, no program to improve customer service survey results can fully

resolve all negative feedback.

This program, designed to improve the point of service, raises the level of

awareness of the need for excellent customer service for new employees, immediately

upon becoming CSRs. It provides tools and reminders that reinforce the skills necessary

to provide an acceptable level of service. It also allows protégés time to learn to utilize

the tools of the trade effectively, in order to reduce the level of stress experienced in the

high stress, fast paced customer service job.

Limitations

Although business sponsorship was initially given to develop this program, the

reality of the corporate budget at ABC Insurance Company does not allow

implementation in the near future. Recent layoffs have caused all departments to deal

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with staff shortages, with little or no personnel available to support this type of program. It has, however, met with positive feedback, and the promise of implementation at some point in the future, as business needs are presented and funding allows.

Peer Assessment Results

The group of individuals who assessed the mentor program materials were enthusiastic about the final product. Their Six Sigma results indicated that a mentor program would be one step toward improvement of customer service survey results. They expressed the collective opinion that the materials contained in this project meet or exceed the stated need for an organized mentor program at ABC Insurance Company.

Recommendations for Further Development

Although the materials are designed to support development of protégés as they progress through the program, another area in which it may be helpful is with mentor development. Although mentors are selected from senior CSR staff, in most cases, they will not have had prior management or supervisory experience. The experience of guiding and counseling new CSRs should prove to enhance their ability to lead, and possibly to act in a supervisory role in the future.

In order for this program to be useful to that end, an evaluation process for mentors should be developed. This evaluation should include input from the protégés, as well as from the mentors' supervisory staff. With input from these parties, a determination could be made regarding whether mentors should be assigned additional protégés from future training classes. Also, it could be used to assist the mentors and supervisors as they work together on performance evaluation for the mentors' yearly

appraisals. This information could be utilized to assist with career planning, as mentors and supervisors determine the mentors' talents and abilities, as they relate to the corporate and departmental goals at ABC Insurance Company.

In order for the success of this program to be determined, a pilot mentor program should be initiated. Although the design of these materials is sound, its success cannot be quantified without a testing phase. Once these tools can be utilized in a real life mentoring situation, the true assessment of the effectiveness of this program can be completed.

<div align="center">Project Summary</div>

This project provides new CSRs with enhanced training provided by side by side coaching from experienced peers. Although it may be that the most successful mentoring relationships are those without a structured framework, that control is necessary in this case, in order to provide the management staff members with data that supports this type of arrangement. The program does not ensure that every CSR will be successful. It does, however, provide new CSRs with a protected environment in which to practice the knowledge and skills learned in the classroom, prior to moving to the customer service unit and engaging in the fast paced work performed there.   The new CSRs are given the opportunity to learn by example from seasoned professionals, while becoming acquainted with the job and work culture of ABC Insurance Company. These materials support the goal to provide better prepared CSRs and, in turn, to provide improved service to the customers of ABC Insurance Company.

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