

Case Study for Large, Global Bank Positions: Customer Care

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Background

The aim of the research was to determine the traits that make Customer Care employees successful at the bank. These traits were formulated into a *job template* that quantifies the traits required for the position. The employees in Collections were considered part of Customer Service and were to be included in the sample. However, past research has shown that Collection positions require a different set of traits than Customer Care. Thus, the template was developed without the Collections employees in the sample. The Collections employees were compared against the template after it was completed, confirming that the required traits are in fact different. (See the low correlation between suitability and performance in the file entitled Group Screening - Collections). Therefore, the Collections template was developed separately using a small sample.

The performance analysis was based upon the performance ratings for 59 Customer Care employees, each of whom completed the Harrison Assessments questionnaire. This data was used to identify the difference between successful Customer Care employees and less successful Customer Care employees. All 200 traits in the Harrison Assessments system were reviewed and analyzed in relationship to performance.

The bank provided three equally weighted performance criteria for the position:

AHT – (Average call handling time) – productivity and efficiency

Quality – (customer friendliness) – quality of the call

Error – (error rate) – accuracy of call handling

AHT was electronically calculated as part of the tracking system. Trained evaluators, who listened in on calls, measured Quality and Error.

As most employees in the sample had been in the Customer Care position for less than a year, the performance ratings provided were based on the monthly performance data from the previous three months (July, August, and September 2005).

The performance ratings were analyzed in relationship to length of employment to confirm that the performance ratings were not confused with different lengths of employment. In other words, we sought to analyze traits independent of on-the-job learning. The employees who had been working in the position longer had slightly higher performance ratings; however, the difference was not significant enough to confuse the results.

The bank rating system is based on a 1-5 scale:

- O = Outstanding (rating = 1)
- EE = Exceeds Expectations (2)
- ME = Meets Expectations (3)
- BE = Below Expectations (4)
- U = Unsatisfactory (5)

The HA rating scale for suitability and performance is:

90-100	Excellent to Best Suitability/Performance
80-89	Very Good Suitability/Performance
75-79	Average to Good Suitability/Performance
70-74	Somewhat below Average Suitability/Performance
60-69	Below Average Suitability/Performance
40-59	Poor Suitability/Performance
0-39	Extremely Poor Suitability/Performance

The bank performance ratings were mapped into the Harrison Assessment suitability/performance scale in order to more easily compare the performance scores with the suitability scores. The mapping was as follows:

<u>HA Scale</u>	<u>Bank Scale</u>
95% =	1 (outstanding)
90% =	2 (Exceeds Expectations)
85% =	2.3
83% =	2.5
80% =	2.7
75% =	3.0 (Meets Expectations)
70% =	3.3
65% =	3.7
60% =	4.0 (Below Expectations)
55% =	4.5
50% =	5.0 (Poor)

The breakdown of the employees provided for the sample was as follows:

	<u># of employees</u>
Excellent to Best	13
Very Good	17
Average to Good	19
Somewhat below Average	5
Below average	4
Poor	1

The Harrison Assessments template methodology

The template methodology formulates the traits that correlate with success for a particular position into *essential traits*, *important traits* and *traits to avoid*. The template is then used to measure future applicants and serve as a developmental guide for current employees.

Applicants or employees can be measure against the template and the results can be viewed on the Behavioral Impact Report or the Group Screening Report that compare the applicants or employees to the position requirements for suitability as designated in the template. These reports provide an “overall” job suitability score between zero and one hundred that represents the individual’s level of *total suitability* for a particular position. A score of one hundred represents a person who is completely suitable for that position. Assuming the person is eligible for a position (has the education, experience, and technical skills), a suitability score of 75 or greater represents a person who has a good probability of performing effectively in that position. A score of 74 or less represents a person who is considered to be less likely to perform well in that position unless he/she has strong eligibility. As the suitability score goes below 60, the candidate is considered to be unlikely to succeed in the position regardless of the eligibility level.

The overall suitability score is obtained from a *job points system*, which is a table that allocates points depending upon the score of each related trait. For example, if a person scores a 10 on a particular trait, that person would receive more points than if the person scores a 9. Since different amounts of a trait have different impact on performance, points are allocated to different scores (amounts) for each trait.

The left column of the table below shows the traits related to the position. These are listed in order of importance. Across the top of the table the numbers 10-0 relate to the score that the individual has on that trait. Therefore, applicants who score a 10 on a particular trait will receive the number of points in the cell that corresponds to the trait in the 10 column. For example, applicants who score a 10 on Analytical will receive 80 points; whereas if they score a 9, they will receive 73 points.

In some cases there are negative points. These indicate that the trait has a negative impact on performance at that level. Desirable traits only have negative scores (usually in the 0-4 columns). This indicates that an absence of the trait correlates with poor performance, but there is no other correlation with different amounts of that trait. The Traits to Avoid start with high negative scores in the 10 column and, as the negative trait decreases in intensity, so does the negative impact. All the positive scores are added and then all the negative scores are subtracted; the final percentage is then calculated by the number of points obtained divided by the number of points possible. Below is the job point table for the Customer Care template.

In this table, Analytical, Collaborative, and Organized are the most important Essential traits and thus they receive the highest number of points in the 10 column. As the person’s score on that trait decreases, so does the number of points obtained. In this

sample, the highest points are in the 10 column and thus the total possible number of points can be obtained by adding the points in the 10 column.

Impact Matrix											
	Assessment Score										
	10	9	8	7	6	5	4	3	2	1	0
Analytical	80	73	66	59	52	45	38	31	24	17	10
Collaborative	80	73	66	59	52	45	38	31	24	17	10
Organized	80	73	66	59	52	45	38	31	21	17	10
Diplomatic	65	60	55	50	45	40	35	30	20	10	0
Helpful	65	60	55	50	45	40	35	30	20	10	0
Pressure Tolerance	65	60	55	50	45	40	35	30	20	10	0
Self-improvement	65	60	55	50	45	40	35	30	20	10	0
Tolerance Of Structure	65	60	55	50	45	40	35	25	10	0	-10
Warmth/empathy	65	60	55	50	45	40	35	30	20	10	0
Authoritative Collaboration	30	27	24	21	18	15	12	9	6	3	0
Numerical	30	27	24	21	18	15	12	9	6	3	0
Repetition	30	27	24	21	18	15	12	9	6	3	0
Sitting	30	27	24	21	18	15	12	9	6	3	0
Forthright Diplomacy	0	0	0	0	0	0	0	-50	-60	-70	-80
Persistent	0	0	0	0	0	0	0	-50	-60	-70	-80
Assertive	0	0	0	0	0	0	0	0	-50	-60	-70
Outgoing	0	0	0	0	0	0	0	0	-50	-60	-70
Open/reflective	0	0	0	0	0	0	0	-30	-40	-50	-60
Analyzes Pitfalls	0	0	0	0	0	0	-15	-30	-45	-50	-55
Clerical	0	0	0	0	0	0	0	0	-20	-30	-40
Computers	0	0	0	0	0	0	0	-10	-20	-25	-30
Precise But Slow	-80	-70	-60	-50	-40	-30	-20	0	0	0	0
Forceful Enforcing	-75	-70	-65	-60	-55	-50	0	0	0	0	0
Dogmatic	-70	-60	-50	-40	-30	-20	0	0	0	0	0
Insensitive	-70	-60	-50	-40	-30	-20	0	0	0	0	0
Defensive	-55	-50	-45	-40	-35	-30	-25	-20	0	0	0
Harsh	-50	-45	-40	-35	-30	-25	-20	-15	0	0	0
Blunt	-40	-35	-30	-25	-20	-15	-10	0	0	0	0

The methodology used above allows the traits to be weighted in terms of impact compared to the other traits. In addition, it allows for different amounts of each trait to have a different impact on the overall suitability. It also allows for some traits to only have a negative impact on performance. This is particularly important for traits where poorer performers tend to have the trait (or be lacking in the trait) but there is no overall correlation with performance. For example, in the case of Persistent (above), negative scores start in the 3 column and becomes more negative toward the 0 column. This indicates that low Persistent score hinders performance and thus the negative points reduce the overall suitability score. If a person scores a 4 on Persistent, no points are subtracted. If a person scores a 3, 50 points are subtracted. If a person scores a 2, 60 points are subtracted.

Results of the performance analysis

Each of the essential traits above show a correlation with success. Low scores on each of the Desirable traits are related to lesser performance. High scores on the traits to avoid are each related to lesser performance. Therefore, every trait included in the template has a relationship to performance. The overall correlation between the suitability scores and the performance scores was .63 (extremely high).

The traits closely relate to what would be expected given the performance requirements of the position. The performance requirements were in three categories: **AHT** – (Average call handling time) – productivity and efficiency, **Quality** – (customer friendliness) and **Error** – error rate (accuracy of call handling). Therefore, we would expect the template to consist of traits that relate to each of those categories; especially in the essential traits.

Traits that relate to Productivity are:

Analytical – able to analyze the call in order to progress with the resolution

Organized – maintaining efficiency

Self-Improvement – continues to try to do better

Pressure Tolerance – able to handle to time pressure

Numerical

Sitting

Persistency

Assertive

Analyzes Pitfalls

Computers

Precise but Slow

Traits that relate to customer friendliness are:

Collaborative

Diplomatic

Helpful

Warmth Empathy

Authoritative Collaboration

Forthright Diplomacy

Outgoing

Open Reflective

Forceful Enforcing

Dogmatic

Insensitive

Harsh

Blunt

Traits that relate to handling the call accurately are:

Analytical
Organized
Tolerance of Structure
Collaborative
Repetition
Numerical
Persistence
Open Reflective (relates to listening)
Analyzes Pitfalls
Clerical

Although Authoritative Collaboration, Numerical, Sitting, and Repetition are listed in the Essential traits, they are given low weightings. This is due to the fact that they showed a correlation with success throughout the entire range of possible scores; however, the correlation was quite small.

Conclusions

The suitability scores and the performance scores of the resulting template was .63. This should be considered as strong evidence of face validity and concurrent validity for this position template. In addition, all of the factors resulting from the analysis logically relate to the performance criteria. This provides confirmation of construct validity and confidence that the resulting template includes traits related to success. In addition, the overall results closely correlate with previous research for similar positions. Consequently, this template can be used with a reasonably high level of confidence for selection and development for this position.