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Getting More Out Of Cross-Training

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Premise

- o Cross-training from a solid training foundation has several benefits and a positive training ROI.
- o Cross-training from a less sturdy training foundation can create new challenges as well as a negative training ROI.
- o Because a solid training foundation is necessary before cross-training can really benefit the organization, our *primary* training must be done well.

Learning Objectives

At the end of this discussion, attendees...

...can better assess how and why they cross-train and identify areas to better align their efforts with desired training outcomes.

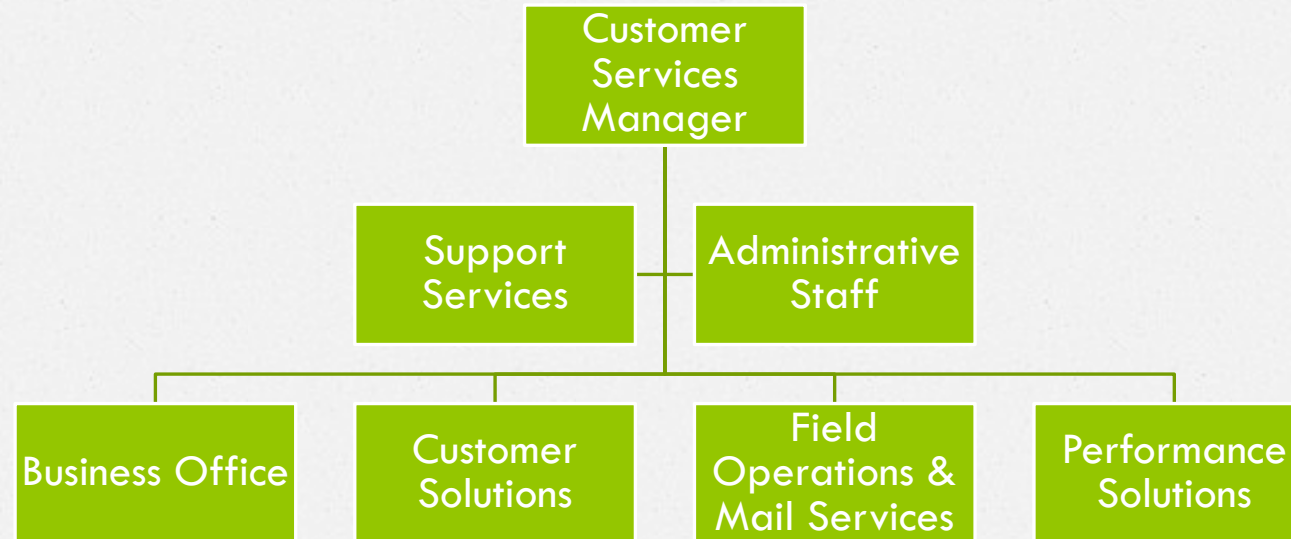
Discussion

- o About Tacoma Public Utilities (TPU)
- o Cross-training at TPU
- o Why we Cross-train
- o Challenges from our traditional approach to Cross-training
- o Building a Cross-training platform
 - o Leveraging an understanding of training design
 - o Functional Job Analysis
 - o 80/20
 - o Define the Training Inventory
- o TPU Cross-training opportunities

About Us (TPU)

- o Located in Tacoma, WA
- o 195,000 customers
- o ~80 Billing and Contact Center CSRs
- o 5 services
- o 3 counties
- o ~440,000 customer contacts per year
- o ~55 daily customer calls per CSR
- o Service Level: 75/30

TPU Structure



TPU Structure

Business Office

- Assistant CS Manager
- **Back Office**
 - 2x Supervisors
 - 2 x CSR Leads
 - 20 x CSR Tech
- **Business Solutions**
 - 1 x Supervisor
 - 1 x CSR Lead
 - 4 x CSR Tech
- **Call Center**
 - 3 x Supervisors
 - 4 x CSR Leads
 - 36 x CSRs
- **Lobby**
 - 1 x Supervisor
 - 2 x CSR Leads
 - 7 x CSR Tech/Setups

Customer Solutions

- Assistant CS Manager
- 1 x Supervisor
- 1 x CSR Lead
- 5 x CSR Tech

Field Operations & Mail Services

- Assistant CS Manager
- **Field Operations**
 - 1 x Manager
 - Meter Reading
 - 1 x Lead
 - 16 x Meter Readers
 - Field Investigation
 - 1 x Lead
 - 14 x Field Investigators
- **Mail Services**
 - 1 x Supervisor
 - 7 x Mail and Stock Processors

Performance Solutions

- Assistant CS Manager
- **Metrics & Reporting**
 - 1 Manager
 - 2 x Analysts
- **Projects and IT Governance**
 - 1 x Manager
 - 2 x Analysts
- **Training Design & Implementation**
 - 1 x Manager
 - 2 x Analysts

Why We Cross-Train

- o Accuracy and Efficiency
- o Continuity and Flexibility
- o Innovation and Improvement

Why We Used to Cross-Train

- o Employees feeling there is not enough investment in them
 - o Incoherence in execution
- o Simply cross-training to have more people who can do more things
 - o Solution misses the core problem
 - o Perishable skills

How We Did Training Better

- o Before we could improve how we cross-trained, we had to improve how we trained!
- o Questions we asked ourselves:
 - o What do we need our agents to do now?
 - o What will we need our agents to do in a future state?
 - o How will we need to structure our teams to meet the needs of a future state?
 - o What will our agents need to know to facilitate the move to a new structure?

Functional Job Analysis

- o What do CSRs really need to know to do the job?
 - o Create a Business Partner
 - o Create a Relationship between BPs
 - o Start/Stop Service
 - o Change Start/Stop Service Requests
 - o Take Payments and set Payment Arrangements
 - o Calculate and setup Budget Billing
 - o Set Budget Billing with a Back Billed Installment Plan
 - o Move-In for Interim Service
 - o Move-In when there is a gap in surface water charges
 - o Move-In for Escrow and Liens

80/20 Rule

100% of the time in onboarding training is spent on the 80% of items that are *Need-to-Know* items. The remaining 20% of items are *Nice-to-Know* items that point to ongoing and/or cross-training opportunities!

Identify the Training Inventory

Module 1 - CS Orient.	Time	Module 2 - Man. Cust. Info	Time	Module 3 - Move Ins	Time	Module 4	Time
Welcome & Intros	60	CICO	45	Owner allocations	120	Environmental Services	120
Expectations	30	Welcome to your house	45	Intro to move-in process	120	Service orders (overview)	60
Tour & HR	75	BP Search/exercise	90	Contact notes	60	Move out considerations	45
CS Practices	45	Create BP	60	Deposits & waiver options	180	Addresses	60
Outlook	60	Change BP	60	Notifications/OHS	135	Create/change move out	120
Using your workstation	30	BP relationships	60	Move in Unknown BP	120	Service order practice	120
Tools you will use	60	Migrated relationships	45	Move in known BP	60		
Welcome to TPU	90	Consent decree	90	Change/Reverse Move in	120		
Union	30	MODULE REVIEW TIME	60	MODULE REVIEW TIME	120	MODULE REVIEW TIME	60
Total - 8.0 hours	480	Total - 9.25 hours	555	Total - 17.25 hours	1035	Total - 9.75 hours	585
Module 5 - Mtrs/Notif.	Time	Module 6 - Billing	Time	Module 7 - Payments	Time	Module 8 - Budget Billing	Time
Meters and meter info	120	Account balance display	120	How customers pay	60	BBP process, dunning	240
Tour - Field Ops	30	Billing cycles/timeline	120	Payment agreements	60	MRUs and double flats	210
Tour - Meter shop	60	Dunning	150	Create payment agreement	90	Create BBP - sim/practice	450
Speaker - Field Ops	30	Rates/svc est fee reversal	105	Refunds & ZFICA	120	Create manual history	120
Notifications	120	Invoices	90	Refund report	90	Back bill installment	240
Cust request mtr sched	30	Auto Pay	60	Pledges/CSO speaker	180	BBP help	90
		High bill/CRM & CRM tour	225	Taking payment/iNovah	120		
		MODULE REVIEW	120	MyAccount website	180		
MODULE REVIEW	30	MODULE REVIEW	120	MODULE REVIEW	120	MODULE REVIEW	120
Total - 7 hours	420	Total - 16.5 hours	990	Total - 17 hours	1020	Total - 24.5 hours	1470
Module 9 - Adv Move ins	Time	Module 10 - Call center pre	Time	Other	Time	Other (cont.)	Time
Escrow/lien, temp svc	120	Correspondence	60	Tour - WW and SW	240	City NEO	690
Bankruptcy & Sandra	60	QA/Side by side, SRA	90	Tour - Light inspection	45	PhonePro	450
PC Assessor website	60	Law enforcement officials	30	Tour - Mail Room	30	TPU NEO	60
OHS - SOP, Uperform	90	Threat letters	45	OpenScape & Verint	120	OCC	60
Commercial (inc. speaker)	60	Department referrals	30	Job Shadowing	1350	Plus/Delta	240
Disc Doc	60	Job discuss - CSR prev class	60	Practical exams	360	Total - 25 hours	1500
Rental Lights (w/speaker)	60	Claims - Ken Clark	60	Mail returns	120		
NCLRD, Deceased Prim	150	Speakers - UP, Comm Conn	60	Svc Orders/OAs in product	900	Total minutes	13425
Irrigation move in/out	30			Hands-on phone practice	900	Total hours	223.75
MOD 9 REVIEW	60			Tech Support/Troubleshoot	120	Total days	30
Total - 12.5 hours	750	Total - 7.25 hours	435	Total - 69.75 hours	4185		

Design the Training Curriculum

- o 8-week course
 - o Six weeks in-classroom
 - o Two weeks OJT (Live calls)

Cross-training Opportunities

- o Advanced CSR functions
- o Cashiering functions for CSR Tech set-ups
- o Back office functions
- o Training SME
- o Project User Acceptance Testers

Aligning Approach and Outcome

- o Accuracy and Efficiency
 - o Advanced CSR functions
- o Continuity and Flexibility
 - o Cashiering functions for CSR Tech set-ups
 - o Back office functions
- o Innovation and Improvement
 - o Training SME
 - o Project User Acceptance Testers

TPU Cross Training Methods

- o Informal OJT Supplemented by Knowledge Assets
- o Structured OJT
- o Blended learning (Classroom and OJT)
- o General exposure to other business functions

Intervals

- o Post-probation for CSRs and Techs (9 months)
- o New CSR Tech Civil Service List is established
- o Upon knowledge of events that affect available staffing
- o Recruitments and Project implementations

Takeaways

Be proactive in identifying cross-training opportunities.

Check alignment of outcomes for cross-training with approach to and reasons for cross-training.

Build a strong foundation of training from which you can build your cross-training approach.



Questions?