



## Call Center Rep Training: 14 Modules

by Mitchell Lieber



### New Hires Get Their Start Through Training

Whether you receive inbound customer contacts or place outbound calls, successful training of new reps is best accomplished through a sequence of step-by-step modules. It is important to enable new employees to learn processes one at a time, move on to the next one and then on to putting the processes all together.

Here is a typical set of training modules. Names and content, as well as sequencing, is adjusted from company to company.

1. The company
2. The market
3. Your service/product lines
4. The call center/sales/service organization
5. Computer software
6. Telephone system
7. Your e-mailings, mailings and advertising before and after calls

8. Types of calls and objectives
9. Call guides and objection-responses
10. Role-playing
11. Handling difficult or exceptional calls
12. Shadowing (double-jacking with) a supervisor or experienced rep
13. Simulated calls
14. Initial calls while being shadowed by a supervisor or experienced rep

It is important to include a quiz periodically, either after each module or after every two or three modules. Trainees should demonstrate competency before moving on to new subject matter. At the conclusion of training, trainees should pass a formal exam on training content and meet specific monitoring standards in order to pass training. Only then should they be promoted from trainee to telephone rep.



It is essential that trainees develop effective ways of handling calls and avoid acquiring bad habits in their first days on the phone. For this reason, many call centers extend the training

period to include the first days or the first few weeks on the telephone. During this period, trainees are given extra support to help them get off to a good start. This may be extra monitoring and coaching, additional mini-trainings, teaming the new rep up with an experienced mentor or all of these.

### **Experienced Reps Keep in Top Form Through Training**

Experienced reps need training too, to keep in top form and to optimize call results. While experienced reps may have learned what to do, and may have done it in the past, continuing to be a great rep requires constant focus and attention.

Areas for refresher trainings will surface during monitoring sessions. If asked, some reps will suggest areas in which they would like additional training. Examples are:

- Building rapport
- Effective use of your voice
- Customer service calls
- Closing the sale
- Using the alternate close to close sales
- Using objection-responses
- Telephone rep performance metrics - how to do well

When appropriate, role-playing and simulated calls should be included. Training videos, training audio tapes and/or outside trainers may be employed to spice up your training sessions. In some cases, a rep who excels in a particular technique can be asked to train others by leading or participating in a training session. Recordings of exemplary calls may also be used.

Changes in the company, product or service, call guide or market are also topics for training sessions for existing staff.

\* These are general recommendations. Specific strategies and tactics should be based on a review of your needs, market and operation. For outside support [contact Lieber & Associates](#).