



# Shadowmatch®

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**A CALL CENTRE AGENT IS NOT JUST A  
CALL CENTRE AGENT- THE SUCCESS  
OF PRECISION RECRUITMENT IN THE CALL  
CENTRE INDUSTRY: A CASE STUDY**

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## **A CALL CENTRE AGENT IS NOT JUST A CALL CENTRE AGENT – THE SUCCESS OF PRECISION RECRUITMENT IN THE CALL CENTRE INDUSTRY: A CASE STUDY**

*- Lizette Bester -*

### **The Scenario**

A call centre is an operation where people communicate with customers by means of telephonic contact with clients. A contact centre is more than a call centre, it is an operation where people communicate with customers by means of multimedia i.e. telephone, internet, e-mail, fax and so on. The purpose of a call centre could be to provide customer service, technical support for products that the customer might have bought, do sales, collect outstanding debt and provide advice. We distinguish between inbound call centres and outbound call centres. An inbound call centre is where the customer makes the phone call – usually for customer service or support. An outbound call centre is where the call centre agent contacts the customer – usually to do a sales pitch or to collect outstanding debt.

Call centres are very demanding on its employees. It is a disciplined environment where precision control can be put in place and perfectionism can easily demand a perfect call from the call centre agent for every client they interact with. Not all people have the behavioural composition to work successfully in a call centre. Staff turnover is a serious challenge in these operations.

A company in the Financial Industry runs a call centre of 1 500 – 2 000 seats. The service provided by call centre agents in this call centre ranges from inbound customer service in telephone banking, inbound service to assist customers that have a problem with the Automatic Teller Machine (ATM) cards, inbound assistance with regards to the Internet, outbound calls to sell different types of loans, banking services and so on. It should be made clear to the reader that this call centre provides a range of services and that the calls either come into the call centre (inbound) or the service agent makes the call to the customer (outbound).

In the call centre industry there is a trend to treat call centre agents as individual who are capable to work in any type of call centre – one often hears the saying “a call centre agent is a call centre agent is a call centre agent”. In other words, you can use a standard model or standard profile to recruit any call centre agent for any type of call centre in any industry.

Currently call centres use a standard Generic Call Centre Assessment Instrument to recruit call centre staff.

The company mentioned in the first paragraph made use of a staffing agency to provide them with call centre staff. This staffing agency assessed all applicants with the Generic Call Centre Assessment Instrument.

When De Villiers, Bester and Associates, owners of Shadowmatch, started dealing with the Call Centre in discussion, they were battling with an annual staff turnover percentage of close to 70%. This was a huge challenge and had a significant impact on the service provided to customers. Why? Because they almost lost all their trained, knowledgeable and competent staff on an annual basis. The high staff turnover meant that they were continuously recruiting and training staff, just to lose them again before they had stayed for 12 months. Keep in mind that the cost of recruiting and training a call centre employee is close to R100 000,00. If an employee leaves within the first 12 – 18 months, it is a loss to the business because he/she hasn't yet started to be productive in excess of his/her cost to the company. In other words, he/she has just been a cost and the company hasn't yet reached a point of break-even on the individual in terms of costs incurred as a result of recruitment cost and salaries paid calculated against productivity.

Shadowmatch was introduced to the top management team of the call centre and they immediately decided to start using it for the recruitment of their staff. They identified the top performers in each specific job area / function and created almost 60 benchmarks (in Shadowmatch also referred to as shadows) – one for each specific job area / function. Once all the benchmarks were created, they started to match every applicant that was provided by the staffing agency to the benchmark profile of the top performers in each specific job function. Where the call centre previously employed all candidates provided by the staffing agency, they now started to match them against the shadows in Shadowmatch and they only placed those candidates that were a good match to one of the shadows. The applicants that didn't match were turned away and sent back to the agency.

Shadowmatch immediately enabled them to employ people that were a match to the successful performers in one of the divisions. By having the luxury of almost 60 specific benchmarks and not just one generic call centre profile, they could now precision place people in the team / department where they were best suited.

This process produced three distinct results:

- 1) It allowed the call centre management to recruit and place people that had similar habits to the top performers in a specific area of business. This resulted in the new recruits also becoming top performing individuals in a short space of time.
- 2) The ability to precision place people shortened their training time. Why? Because of the fact that the new employees shared the habits of the top performers, they immediately fitted into the team and learned the technical competencies and skills much easier and quicker. Upon interviewing some of these new employees and questioning them about their early successes, they said: "These are my kind of people. I feel comfortable working in this environment and in this team".
- 3) The call centre was able to reduce the annual staff turnover by almost 50%. In a period of 10 months they had dropped from close to 70% staff turnover to a staff turnover of about 26%. The precision capabilities of Shadowmatch immediately allowed them to retain their staff for a longer period.

### ***Why is Shadowmatch more effective than a Generic Call Centre Assessment Instrument?***

Our research and many call centre case studies have indicated that the Generic Call Centre Assessment Instrument, only measures the people aspects of a call centre agent. What does this mean? The individuals that were selected by using the Generic Call Centre Assessment Instrument have also been assessed by using Shadowmatch. It became clear that they all share the habits of People Positive Behaviour, Altruism, Conflict Handling and Team Inclination. It seems as if the Generic Call Centre Assessment Instrument has been developed to identify specific attributes that would be fit for any type of call centre. It doesn't assess a lot of other important habits necessary to be successful at the job, for example time management, conceptual application, resilience, propensity to own and propensity to hand-off.

It must be kept in mind that call centres are not the same. Specialists distinguish between different levels of complexity in call centres. In some call centres the job is very linear, in other words the call centre agent needs to do very simple and straight forward things in order to provide customer service. Example: Give a customer a balance on his account.

In other call centres the job is more lateral. This would mean that the call centre agent needs to take an action in order to provide service to the customer. Example: Transfer funds from one account to another account for the customer.

The third type of call centre in terms of complexity is a conceptual call centre. This is the most complex type of call centre to work in. In these call centres the service agent needs to interpret what the client says, provide advice and take action in order to provide customer service. Example: Give a customer investment advice on money that he has inherited. Take action in doing the necessary investments.

By just taking the above facts into consideration, one can understand that a generic approach towards assessing whether someone is suited for a call centre environment would not work. Firstly because no call centre environment is the same as the next and secondly, besides the different complexity levels, one also needs to remember that each call centre has a different culture, leadership style, level of technology sophistication and so on. It is therefore important to take a holistic and specific approach when assessing whether an individual would be suited for a specific job in a specific call centre. The only way to currently do this successfully is by means of Shadowmatch. Shadowmatch takes the job, the person as well as the environment or context (which includes culture, leadership style, all the different aspects of the working environment, the team dynamics, etc.) into consideration when mapping the habits of the successful performers in order to draw a map of what is necessary to be successful in that specific job.

In one of the call centres where we mapped the habits of the top performers, the following came out as important habits to be successful in the job:

- Propensity to hand-off (this was very interesting as we usually assume that a successful call centre agent needs to have a habit of taking ownership. In this call centre one of the most critical habits was the propensity to hand-off).
- The habit of discipline. This refers to the habit of working in an environment that is regulated by policies, procedures, rules and regulations.
- Team inclination.
- The habit of working positively with other people.
- The habit of handling conflict.
- The habit of working in a routine environment.
- The top performers indicated that it is necessary to apply ones conceptual ability 30%. To explain: The top performers scored 3/10 for the conceptual questions. This is an

important indicator. Anyone scoring way less or way more would not be successful in this job.

- The top performers completed the Shadowmatch worksheet in an average time of 46 minutes and 40 seconds.
- The top performers also indicated that their dominant approach to their world is one of being involved. They have a tendency to read the situation and be unaggressively involved when necessary and aggressively involved when the situation asks for it.

All staff appointed in this call centre was assessed by the Generic Call Centre Assessment Instrument. They all showed strong habits in the behaviour of being positive towards people, having a strong team inclination and most of them had a propensity towards taking ownership (please remember that the top performers showed a habit of handing things off!) We assessed a fair sample of staff through Shadowmatch in order to draw a proper comparison as to who will really be successful in this call centre.

The following became clear through the Shadowmatch results:

- The call centre agents' habits ranged from a propensity of taking ownership through to a propensity of handing off.
- The conceptual application ranged from a score of 0/10 through to 7/10.
- Some of the staff displayed a very defined habit of solving problems as well as a very deeply embedded habit of acting immediately and quickly (responsiveness). The shadow of the top performers indicated that these were not important habits towards success in this call centre.
- The time in which the worksheet was completed ranged from much quicker compared to the top performers (shadow) to much slower compared to the shadow. The top performers completed the Shadowmatch worksheet in an average time of 46 minutes and 40 seconds. The time it took the other call centre agents to complete the worksheet ranged from 35 minutes and 26 seconds (shortest) to 106 minutes and 45 seconds (longest).
- The agents' attitude (approach to their world) was very diverse. Some staff displayed an attitude of being dominantly uninvolved whilst the top performers displayed an attitude of being dominantly involved and unaggressive.

We've asked the management team to jot down the names of the average to poor performers. We used Shadowmatch to rank the staff from the best match to the shadow right through to the poorest match. It turned out that only 8 of the 32 staff were really a match to the top performers. More than 15 of the staff members could, according to Shadowmatch, not be successful in this specific call centre. Upon checking with the management, the names of the average and poor performers that they had jotted down were, with the exception of one name, exactly the same as the poor matches on Shadowmatch. We also learnt that some of the staff that wasn't a good match to the shadow, had already resigned within their first month of employment. Keep in mind that all these staff members were successfully assessed by the Generic Call Centre Assessment Instrument and employed with a prediction to be successful in the call centre.

### **Conclusion**

Through this exercise it became clear that one cannot recruit successfully by means of a generic assessment. The assessment used must be specific to the job and the environment. The top performers in an environment need to indicate which habits are necessary to be successful in the specific job. This is the very reason why Shadowmatch has again and again proved to be the best way to precision employ and precision develop people.