

Improving skills of call center consultants



T-GRAL: our training method

T-GRAL (our training method) has been build on achievements of andragogy (the art and science of educating adults), GRL (Getting Results through Learning) standard created by the the US Development Council Task Force (led by Dr. Marjorie L. Budd from the US Department of Defense), and case study analysis created at Harvard Busines School. T-GRAL has been designed to fit Polish conditions and tested under these conditions.

Adults (1) need to know the reasons for learning, (2) do not like to be instructed, (3) treat learning as an element of problem-solving processes, (4) are motivated to learn when they see practical application of new knowledge, (5) learn easier and more effectively when they interact with other people, and when (6) the trainer moderates learnign processes and helps to organize their thinking.

In the core of T-GRAL method lies double loop learning theory (Argyris 1976) which takes that adults usualy have their own methods, concepts, and bieliefs. Teaching them should not rely on providing them with new knowledge because this does not change their behavior. Trainer should concentrate on making them understand what they do and how they do it, and making them reach their own solutions. There solutions have to be acceptable not only to the Employer but also to the trainees (see also Argyris, Putnam & Smith, 1985; Argyris, 1993; Schon & Argyris, 1996).

Standard GRL has been applied by Motorola, Ford, 3M, DuPont. Case study method is perhaps the most widely method used in training business leasers.

A workshop based on pre-recorded phone conversations

The starting point for a workshop training are participants' own pre-recorded phone conversations. The training is supplemented with a set of topics and a list of discussion issues suggested by participants before and during the training.

For the method to be used, the trainer must receive audio files in advance, listen to them, make critical evaluation, choose calls with the greatest teaching potential, and thoroughly analyze the chosen calls.

The chosen calls will be analyzed by participants under the coach's guidance.

Training based on recorded phone calls shows exceptional effectiveness. Participants are assured that the coach is familiar with the nature of their job. Participants acquire the skill of critically analyzing their own conversations.



This training will refer especially to the following competences of operators:

1. self-assessment ability, self-reflection, and self-criticism:
 - a. evaluating one's own abilities and experiences;
 - b. ability to think critically and maturely about one's own limitations and skills;
2. abilities connected with human communication:
 - a. ability to listen, understand messages and analyze critically;
 - b. ability to organize and integrate information and formulate one's thoughts;
 - c. culture of discussion;
3. ability to work in a team:
 - a. ability to express one's own opinion;
 - b. ability to formulate critical judgements of oneself and others;
 - c. ability to react when criticized.

The essence of the training is not covering the topics suggested by the trainer, but analyzing the problems occurring during conversations made by participants and thinking over ways of increasing the quality and effectiveness of phone calls, and enhancing the comfort of work of the employees.

Legal and ethical issues related to call recordings

None of the Polish legal acts regulates the issue of recording employees' conversations. Therefore, the Employer is not limited in this area.

It is advisable to inform the employees that their calls will be recorded. The most convenient way of doing this is to write down a document and request that all employees sign the document after they have read it.

A sample document:

As of _____ (date), _____ (company) starts call recording.

Call recordings will be used for quality control, training and resolving possible disputes between operators and clients.

_____ (company) will secure the recordings and protect them from falling into unauthorized hands.

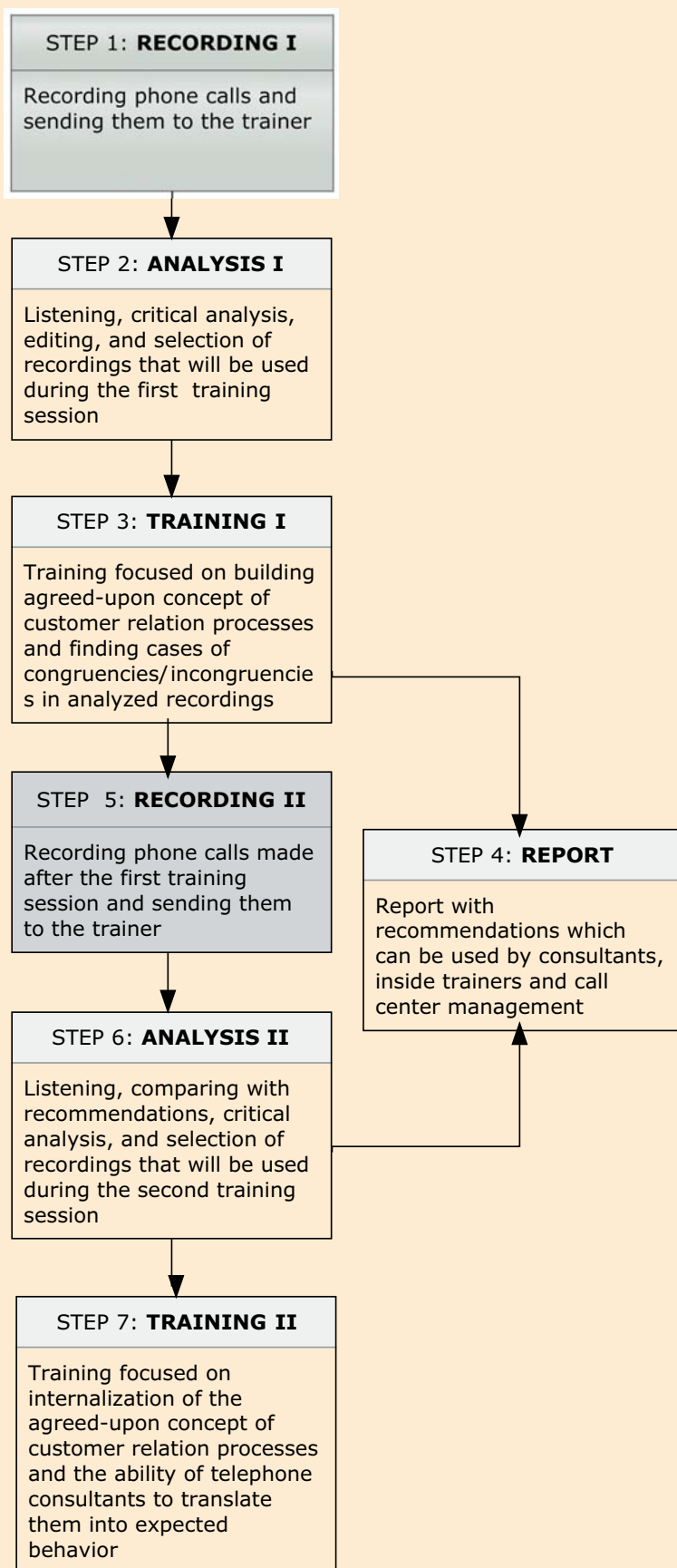




Timetable

The diagram on the left shows steps presented in the RFP. The only exception is step 4.

Report will contain recommendations related to handling telephone contacts. It will show mistakes that are most common and most damaging to the company. It will look into causes of such mistakes and ways to eradicate the.





Value-to-price comparison

Each of 100 consultants will get 14 hours of workshop, during which he/she:

- a. learns how he/she handles phone relations, but also how similar situations are handled by his/her colleagues,
- b. gets critical comments not only from the trainer, but also from co-workers,
- c. participates in discussion on the way to improve phone relations with the clients as well as barriers caused by (a) consultants' insufficient knowledge or practical skills, (b) consultants' wrong concept of customer-company relations, (c) mistakes made by direct supervisors, (d) defective procedures, and (e) other factors, such as deficiencies of computer software or actions taken by other organizational units.

And all of the above from the person who for 10 years lived in the US, and during this time taught at universities, including business schools. From the person who 13 years ago introduced this method of training to the Polish call center community, and who completed almost 40 such training projects (see the client list).





Information about MasterPlan

MasterPlan's market position

All of the training and consulting projects included on the list of clients have been written PERSONALLY by the bidder. MasterPlan is not the organizer of trainings who uses the services of contracted or commissioned coaches. Training and consulting projects are executed by Marian J. Kostecki, Ph.D, and recruitment projects are executed by Żaneta Ptak-Kostecka, Ph.D.

There is no other consulting training company with such:

- range of experiences:
 - o MasterPlan used to run its own service call center. Its consulting projects range from designing to recruitment, equipment bidding, initial and development trainings, as well as assistance in acquiring call center companies.
 - o the quality of proprietary consulting and training programs;
 - o variety of services;
 - o teaching activity abroad (9,5-year teaching at American universities, including 6 years in business schools, both MA and MBA programs);
- position (see the bios below);
- range of publications, etc.

Marian J. Kostecki, Ph.D.

Marian J. Kostecki, Ph.D. - The Definitive Source for Telemarketing and Call Center Market Knowledge and Know-How in Poland

Strategic Consultant

Dr. Marian J. Kostecki is the General Manager of MasterPlan, a consulting and training company established in 1991. In 1995-96 he ran the first service call center in Poland. Since 1996 he has specialized in providing consulting services and advice to both service and in-house call centers in Poland and internationally.

Most recently Dr. Kostecki has brokered a deal for the sale of a group of call centers in CEE to a global call center powerhouse. He is an active participant and speaker at international telemarketing and call center conferences and has written about offshoring and near-shoring in the call center industry. In April 2004 Dr. Kostecki published a comprehensive overview of the call center and telemarketing services market in Poland in order to assist foreign companies in dealing with the Polish call center market. Since February 2005, Dr. Kostecki is the President of the Call Center Managers' Association. He is also cofounder of the telemarketing section of the Direct Marketing Association.

Trainer

Dr. Kostecki has trained more than 2000 employees in his in-house workshops and classes in the area of sales, customer service and marketing. He teaches, lectures and does keynote addresses. He has trained scores of telemarketers in phone conversation techniques, telesales and telephone customer care. He is the founder of the Telemarketing Academy, the most comprehensive Polish training program for call center managers.



Business Professor

In the past, Dr. Kostecki designed and taught undergraduate and graduate courses at the Department of Management and Marketing, College of Business, Oregon State University (MBA studies) and at the Department of Management, California State University in Sacramento (MBA studies). He also taught at the Department of Management (University of Warsaw), the Department of Sociology (University of Virginia), the Department of Political Science (University of Connecticut), and the Polish-American Business School (Cracow, Poland). In 1986 Dr. Kostecki served as a National Fellow at the Hoover Institution at Stanford University.

Researcher

During his academic stage Dr. Kostecki was an active participant in international research projects and workshops sponsored, among others, by the International Labor Organization (Geneva), the European Institute for Advanced Studies in Management (Belgium) and the European Group for Organizational Studies (Europe). Dr. Kostecki's research grants were awarded by the U.S. Department of State, American Council of Learned Societies, The Pew Charitable Trusts, Social Science Research Council (Great Britain), Swedish Royal Academy of Arts and Letters and the Polish Academy of Sciences.

Author

Dr. Kostecki has authored and co-authored six scientific books (published in several languages) and over fifty academic articles published in six languages. He widely writes about telemarketing and call center issues. Dr. Kostecki is also author of the Telemarketer's Handbook, the first telemarketing how-to-guide in Polish (1996), Telephone Sales Conversation (2006), Efficiency and Effectiveness of Call Center Operations (2006), and The Glossary of Call Center Terminology: 1155 Polish and English-Language Terms (2007)

In 1983 Dr. Kostecki received the prestigious POLCUL Foundation (Australia) for supporting independent Polish culture.

Żaneta Ptak-Kostecka, Ph.D.

Dr Żaneta Ptak-Kostecka, Managing Director of MasterPlan, is a psychologist, with Ph.D. in pedagogy from the University of Wrocław.

She used to work at the Department of Psychology, the University of Wrocław and at the Management and Marketing College in Wrocław. For several years she served as a trainer at Oriflame-Poland. She also served as the Head of Personal Marketing specialization track at the Communication and Social Media College in Warsaw.

Among her strongest competencies are:

- evaluation of managerial potential (Assessment Center method)
- psychology of sales and customer care
- interpersonal communication
- relaxation training (stress and the ways to handle it)
- presentation skills (skills devoted to present oneself, product, service).





Telemarketing & call center projects

The list of clients of MasterPlan along with the descriptions of the project (only call center related projects) is presented below. It comprises over 180 companies, some of which have cooperated with us for years now.

Note: All listed training and consulting projects were conducted by Marian J. Kostecki Ph.D, and recruitment and selection ones were conducted along with Żaneta Ptak-Kostecka Ph.D.

Completed projects:

- ABW (publisher) - selling catalog by phone
- Accmed (LIM Centrum Medyczne) (medical services) - participation in Call Center Masters
- ACP Pharma (pharmaceutical wholesaler) - audit of telephone customer order taking and customer care; training of call center operators, recommendations for changes in procedures, audit of call center personnel
- Agora-Gazeta Wyborcza (newspaper) - training in selling advertisements by phone, audit of telesale conversations
- Ahold (super- and hypermarkets) - organizational diagnosis and plan for implementing an international Accounting Help Line
- Allianz (insurance) - audit of telephone appointment scheduling; training for high-level management; recommendations for changes in procedures
- Altar (software producer) - training devoted to call center organization
- Amica Wronki (producer of home appliances) - participation in Call Center Masters
- arvato services (service call center) - participation in Call Center Masters
- AS Kontakt (service call center) - participation in Call Center Masters
- Aster City Cable (cable TV) - training in customer care, including customer care by phone
- AT&T (telecommunication) - distribution of AT&T US Direct cards by phone
- AVANSSUR S.A. (AXA Ubezpieczenia) (insurance) - recruitment of call center operators and supervisors, participation in Call Center Masters
- AZ Soft S.A. (service call center) - participation in Call Center Masters
- BANCOM (service call center) - consulting in call center design, recruitment of call center operators, recruitment of the call center head, training of call center operators
- Bank Ochrony Środowiska (bank) - consulting in call center work procedures; personnel recruitment and training
- Bank Zachodni WBK S.A. - participation in Call Center Masters
- Bankowy Dom Maklerski PKO BP (stock exchange broker) - design of call center procedures
- Beskidzka Agencja Informacji (business information agency) - training in telemarketing
- Biuro Projektowania Systemów Cyfrowych S.A. (software producer) - training in handling business relations by phone
- bizCentrum (internet agency) - training in setting-up appointments by phone
- BOC-Gazy (industrial gases) - audit of telephone customer order taking and customer care; training of call center operators, recommendations for changes in procedures, participation in Call Center Masters
- Boehringer Ingelheim (pharmaceuticals) - seminar reservations
- BRE Bank SA (mBank, Multibank) - participation in Call Center Masters
- Buro Market (office equipment) - training in handling business relations by phone
- Business Foundation - selling expo space for exhibitors
- Call Center Poland (service call center) - training of call center operators
- Call Service (service call



- center) - training of call center operators in telephone sales
- Carbo (pharmaceutical wholesaler) - training of telesales agents
- Central Europe BPO (service call center) - training of call center operators in telephone sales and customer care, and in call center organization
- Centrala Farmaceutyczna Cefarm (pharmaceutical wholesaler) - training of telesales agents
- Centrum Promocji Informatyki - presentation on CRM implementation
- Cezex (office paper distributor) - consulting in call center design, recruitment and training of call center operators, writing database application
- Checkpoint Systems (tracking and security for retailers) - consulting in center outsourcing
- Cisco (computers) - recruitment and training of telesales agents, audit of telephone conversations
- Commercial Union Direct (ubezpieczenia) - audit of telephone sales and customer care processes
- COMP Rzeszów (software producer) - training of telephone help-desk operators, audit of telephone conversations
- ContactPoint (service call center) - participation in Call Center Masters
- ConXperts (computers and WANs) - setting up appointments by phone
- CPC Amino/Caterplan (later Best Foods, Unilever) (FMCG) - consulting in call center design, recruitment and training of call center operators, writing software application for database, audit of telephone conversations
- CTM - Centrum Telemarketingowe (call center - service center) - training for managerial staff
- Cussons (FMCG) - database verification
- D+S europe (call center corporation, Germany) - not to be disclosed
- DaimlerChrysler Automotive Polska (automotive) - recruitment of call center operators, training of call center operators, organizational consulting, audit of telephone conversations
- Dendrite (research company) - training of CATI operators, recruitment of operators
- Deutsche Bank S.A. - participation in Call Center Masters
- Dialog (telecom) - participation in Call Center Master
- Direct Line (insurance, U.K.) - consulting on partners in Poland
- Dr Pokorowski (pharmaceutical wholesaler) - training of telesales agents; recruitment of call center operators
- EF English First (language school) - training reception staff in using telephone for promotion, sales and customer care
- Elhurt (electronics wholesaler) - audit of telesales and training in telesales
- Elita (promotional materials) - training in telesales
- Eltra S.A. (electrical installation manufacturing) - consulting in call center design, recruitment of call center operators, training of call center operators, consulting in software selection
- ENERGA Kalisz (electrical energy distributor) - participation in Call Center Masters
- ERA (GSM operator) - training of telesales agents, participation in Call Center Masters
- Eskadra (training organizer) - presentation on telesales
- Euro Contact Center (service call center, outsourcing) - not to be disclosed
- EuroForum (conference organizer) - presentation on recruitment of call center operators
- Europa (insurance company) - presentation on telemarketing in financial institutions
- Europejski Fundusz Leasingowy (leasing) - presentation on telemarketing in financial institutions
- Farma (pharmaceutical wholesaler) - selling injections by phone
- First Data (formerly: Polcard) (financial) - participation in



- Call Center Masters
- Forte Vita (trade company) - participation in Call Center Masters
- Frantschach Świecie (paper manufacturer) - training of purchase department employees in using telephone
- Getin Direct (service call center) - coaching for call center manager
- Gnosis (training organizer) - selling specialized seminar by phone
- GoodWay Telemarketing Wielkopolska (call center - service center) - recruitment of call center operators
- Guliwer (puppet theater) - telephone search for financial support
- Hestia Kontakt (in-house call center) - training in measuring effectiveness and efficiency of in-bound traffic, with elements of call center management
- home.pl (internet provider) - consulting in call center design and preparing work procedures; personnel recruitment and training
- Horus (industrial materials distributor) - audit of telesales and telephone customer care; training of sales force and customer care specialists
- Iberia Motor Company (automotive) - consulting in call center design, technological and equipment consulting, training of call center operators
- IBM (call center systems producer) - presentation on CRM (Customer Relationship Management) for IBM clients
- IBUD (publisher) - call center audit, training in telesales
- IDEA Centertel - training of call center operators in outbound calls; training of call center supervisors
- Infor (publisher) - training of telesales agents, audit of telephone conversations
- Infoskop (business information agency) - training of telesales agents
- ING Bank Śląski - participation in Call Center Masters
- ING Securities - participation in Call Center Masters
- InsERT (software manufacturer) - participation in Call Center Masters
- Institute of International Research (conference organizer) - presentation on organizational preparation for developing telemarketing activity
- Instytut Rynku Elektronicznego (conference organizer) - presentation on call center market in Poland
- Instytut Zarządzania (conference organizer) - presentation on combining promotion, sales and customer care in telephone conversations; presentation on establishing call centers; presentation on CRM outsourcing
- Inter Partner Assistance Polska S.A. (formerly: AXA Assistance; assistance services) - recruitment of multilingual call center operators
- Interactive Intelligence (vendor of call center systems) - presentation on call center market in Poland
- International Paper (paper manufacturer) - participation in Call Center Masters
- Invest Bank (bank) - presentation on telemarketing in financial institutions, training of call center operators
- Invest-Net (insurance agency) - consulting in call center design; call center technology consulting; recruitment of call center operators; recruitment of the call center head; training of call center operators, audit of telephone conversations
- Investor Center/Ostbrandenburg (ICOB), Frankfurt am Oder - consulting on telemarketing in Poland; presentation on call center market in Poland
- IVECO Poland (automotive) - leasing a call center operator
- Izba Przemysłowo-Handlowa w Toruniu - presentation on telemarketing applications in market activities
- Kredyt Bank (bank) - recruitment of call center operators; training of call center operators; training of call center supervisors, audit of telephone conversations, participation in Call Center Masters
- Kruk Inkasso (debt collection agency) - training in selling by phone



- Leasing Management (leasing)
 - telephone market research on demand for financial services
- Link4 (insurance) - recruitment of call center operators, participation in Call Center Masters
- Lionbridge (service help desk) - participation in Call Center Masters
- Lux-Med (medical services) - participation in Call Center Masters
- Makro Cash & Carry Polska S.A. (supermarket network) - training in telephone customer care, participation in Call Center Masters
- Mapy Ścienne Beata Piętka (publisher) - training in telesales
- Marketplanet (IT consulting and training) - assistance in recruitment of call center operators, audit of telesales and telephone customer care; training in call center functioning, training in telephone appointment setting
- Maxon (office furniture) - training in setting up appointments by phone
- MDC (office furniture) - training in selling by phone
- Medicines (pharmaceutical wholesaler) - training of telesales agents, audit of telephone conversations
- Metalplast Oborniki (construction materials) - training in using telephone for promotion, sales and customer care
- Midwest Business Training (training organizer) - open trainings in telemarketing applications
- Międzynarodowe Targi Katowickie (trade fair) - training in telephone sales of trade expositions, audit of telephone conversations
- Międzynarodowe Targi Polska (expo and conference organizer) - audit of telesales and telephone customer care; training of call center operators
- MNI S.A. (operator telekomunikacyjny) - recruitment of a call center specialist
- moimzdaniem.pl (survey creation software distributor) - recruitment of call center operators, training of call center operators, participation in Call Center Masters
- Monsanto Polska (chemical) - training in using telephone
 - by sales representatives
- Multimedia (cable TV operator) - participation in Call Center Masters
 - Net Premium (insurance) - participation in Call Center Masters
- Netia Telekom (telecommunication) - recruitment of call center operators and supervisors; training of call center operators
- Nordea Bank - participation in Call Center Masters
- Nordea PTE (insurance) - participation in Call Center Masters
- Nowoczesna Firma (conference organizer) - presentation on call center management
- NPN Telemarketing (call center - service center) - consulting in call center design, recruitment and training of call center operators
- OBI (home improvement super store) - coaching for the head of telemarketing project
- ODM Optimus Direct Marketing - presentation on telemarketing basics
- Office Depot (office equipment and supplies) - training of call center operators
- OFI/Citigroup (agent transferowy) - participation in Call Center Masters
- Optimus-Bis (computers) - training in selling by phone
- Papiрус (office supply distributor) - audit of telesales and telephone customer care; training of sales force and customer care specialists
- PC Kurier (monthly magazine) - presentation on CRM (Customer Relationship Management) basics
- PGD (car dealer) - participation in Call Center Masters
- Pharmag (pharmaceutical wholesaler) - training in selling by phone, audit of telephone conversations
- Pilkington (glass manufacturer) - training in customer care (including customer care by phone)
- Pioneer Financial Services - training of call center operators in providing free-phone service
- PKO BP (bank) - training in telephone customer care



- Play Mobile (GSM operator) - recruitment of multilingual call center operators and call center specialists, participation in Call Center Masters
- Plus GSM (Polkomtel) (GSM operator) - participation in Call Center Masters
- Polska Grupa Dealerów (automotive, Ford dealer) - training in telephone relations with clients; consulting in call center outsourcing, audit of telephone conversations
- Polska Telewizja Kablowa (cable TV) - training in selling by phone, audit of telephone conversations
- Polskie Linie Telefoniczne (call center - service center) - training in recruitment of call center operators
- Powiatowy Urząd Pracy w Wołominie - training for call center operators
- Presspublica (Rzeczpospolita) (newspaper) - consulting in providing subscribers with service by phone
- PriceWaterhouseCoopers (business consulting) - training in telephone relations with clients
- Prodoks (virtual bookstore) - training in taking orders by phone, active telesales and customer care by phone; audit of telephone conversations
- Proma (business information agency) - audit of telephone conversations, training in selling by phone
- Provident (financial) - participation in Call Center Masters
- PZU-CL Agent Transferowy - audit of telephone conversations, training of call center operators in selling and customer care by phone; training of call center supervisors
- Qumak-Sekom (vendor of call center systems) - presentation on call center market in Poland
- Raiffeisen Bank - participation in Call Center Masters
- Reader's Digest Przegląd (publisher) - audit of telephone customer care and training in customer care by phone
- Rhône-Poulenc Rorer (pharmaceuticals) - training of telesales agents
- Sanitec Koło (bathroom equipment manufacturer) - presentation on potential applications of telemarketing
- Santander Consumer PTF Bank - consulting in the process of selecting providers of the call center infrastructure
- SawaTour-Chorwacja (tour operator, travel agency) - selling ads by phone
- Sea Star (publisher) - comprehensive call center audit; consulting and training for call center operators, supervisors, and managers
- Slavex (pharmaceutical wholesaler) - training of telesales agents
- Software-Konferencje (training and conference organizer) - presentation on recruitment of call center operators
- SR Teleperformance (international call center corporation) - consulting in the area of call center acquisitions in Poland, Czech Republic and Slovakia
- Ster-Projekt (computers) - training in selling by phone
- Stowarzyszenie Marketingu Bezpośredniego (direct marketing association) - presentation on practical applications of telemarketing
- Studio Moderna - consulting related to strategic development of the call center
- Świat Wiedzy (publisher) - audit of telephone conversations
- TeleBuch (call center, Germany) - not to be disclosed
- Telekomunikacja Polska S.A. (telecom) - training in selling by phone; recruitment of call center operators, participation in Call Center Masters
- Telemedia (service call center) - consulting in call center design; recruiting call center head; recruitment and training of call center operators
- TIM Call Center (service call center)-audit of telephone sales support and recommendations for improvements; training in telephone sales support, training for mid-management, consulting related to strategic development of the call center, participation in Call Center Masters
- TNT Express Worldwide (courier services) - database verification
- TVN24 (television station) -



- participation in Call Center Masters
- Toshiba Tec Poland S.A. (office equipment distributor) - training in telephone customer care
- tp.internet (call center - service center) - recruitment and training of call center operators and supervisors
- TV Promotion Group (infomercial sales) - consulting in selling by phone; training of call center operators
- TV-Shop (infomercial sales) - training of call center operators
- Unima 2000 S.A.(integrator) - training of sales personnel, participation in Call Center Masters
- UPC(telecommunication, cable TV) - audit of telephone customer care, training in telesales and telephone customer care, participation in Call Center Masters
- UPS (courier service) - audit of telephone customer care, training in telesales and telephone customer care
- Vattenfall (electrical energy distributor) - participation in Call Center Masters
- Wanel (trade company) - training for call center supervisors
- Wiedza i Praktyka (publisher) - recruitment of call center specialists, participation in Call Center Masters
- Wimed (road sign manufacturer) - training in telephone sales and customer care by phone
- Wydawnictwo Naukowe PWN (publisher) - training of call center operators; recruitment of call center operators; recruitment of call center head, audit of telephone conversations
- Wyższa Szkoła Przedsiębiorczości i Zarządzania im. Leona Koźmińskiego - lectures on telemarketing
- Wyższa Szkoła Zarządzania i Marketingu - lectures on telemarketing
- XXX (the Client wishes to remain anonymous) - audit of telephone customer care; training of call center operators
- Yellowtel (business information) - participation in Call Center Masters
- Zakład Energetyczny Płock S.A. (Operator Sieci Rozdzielczej/Mobius) (electrical energy distributor) - consulting in call center design; recruitment and training of call center operators, preparation of organizational procedures, audit of telephone conversations
- Zakład Energetyczny Płock S.A. (Dystrybucja Wschód, Dystrybucja Zachód) (electrical energy distributor) - training in telephone customer care
- Zig-Zag (IT and telecommunication company) - call center audit and training in telesales
- ZWUT, a Siemens company - presentation on applying phone contacts in customer care and debt collection for electric energy distributors, presentation on applying phone contacts in gas distribution companies