

How to Fix Contact Center Onboarding

Insights from 400+ Contact Center Employees



Welcome to today's webinar!

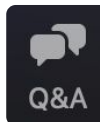


Justin Smith

Sr. Content Strategist @ Balto
Webinar Host/Moderator



Today's session will be about **30 minutes** with time for **Q&A**.



Use the **Q&A button** on your screen to submit questions.



All registrants will receive the **video recording** and **slides** following the broadcast.



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The Conversation Excellence Lab

The Conversation Excellence Lab is Balto's hub for academic-level research. We create thought-leading content with the support of research teams and in-house data.

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Today's Webinar Speakers



Justin Smith

Sr. Content Strategist,
Balto



Lior Torenberg

Head of the Conversation
Excellence Lab, Balto



Michelle Barbeau

Sr. Customer Enablement
Manager, Balto

A Quick Poll

Research Demographics

408

Contact center employees: 204 agents and 204 management & leadership

35-44

Average age range for all respondents

21-100

Avg. company size (28% of respondents)

60.3%

Of agents had been in their job for 3+ years

15.9%

Of respondents worked in healthcare, the most represented industry

41.2%

Of senior respondents were managers

Poll Results

Research Takeaways

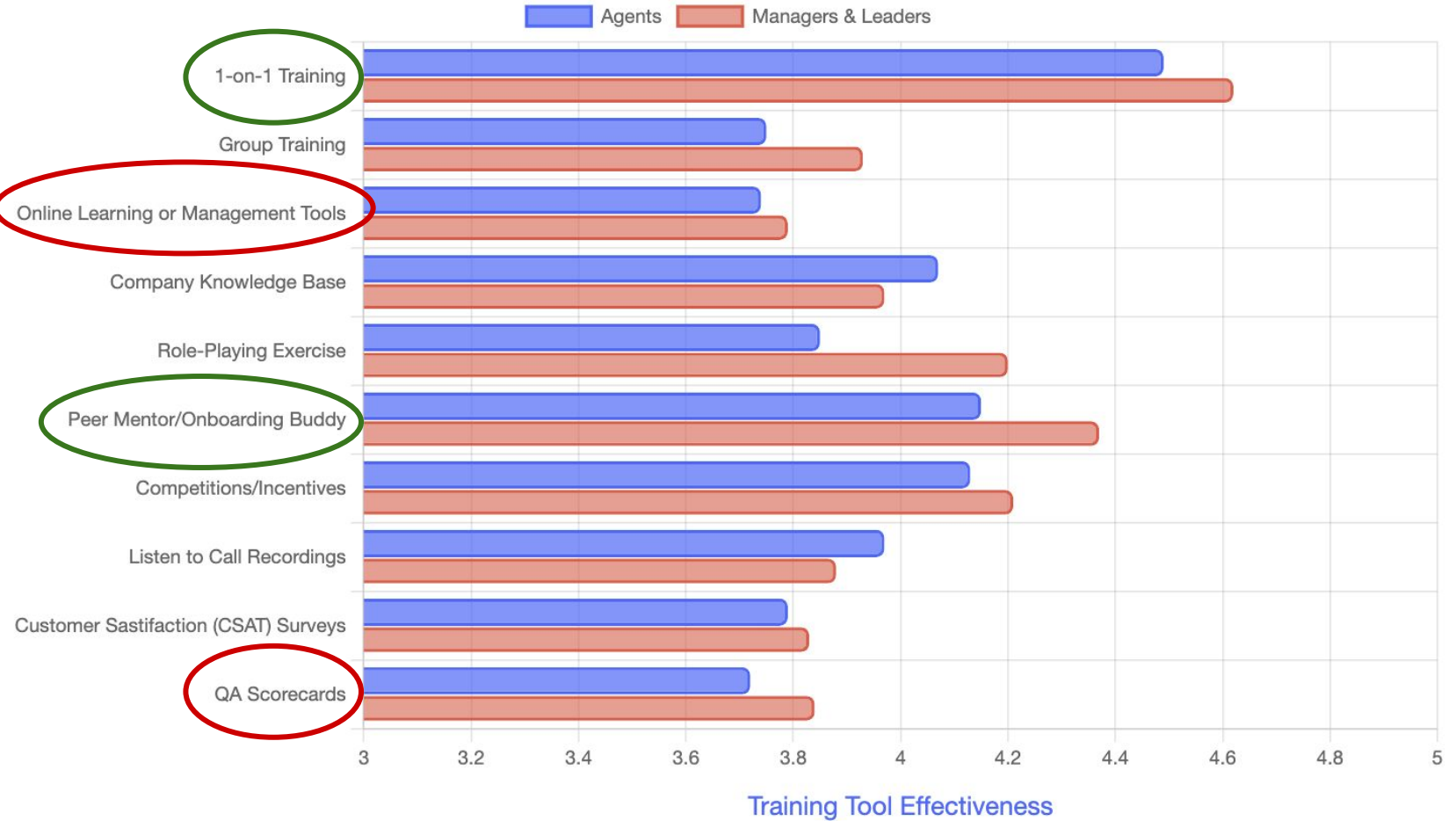
1. Both management and agents prefer 1-on-1 training during onboarding: a personalized experience is the best experience
2. Leadership often overestimates how much agents remember from onboarding
3. Agents report that managers and supervisors should lead onboarding — not executives

Research Takeaways

4. 2 out of 3 agents want to change their onboarding
5. What managers find most important during onboarding has a big impact on knowledge retention. Sneak peek: enforcement isn't the answer.



One-on-one Training Reigns Supreme



Bulk Up Onboarding Support

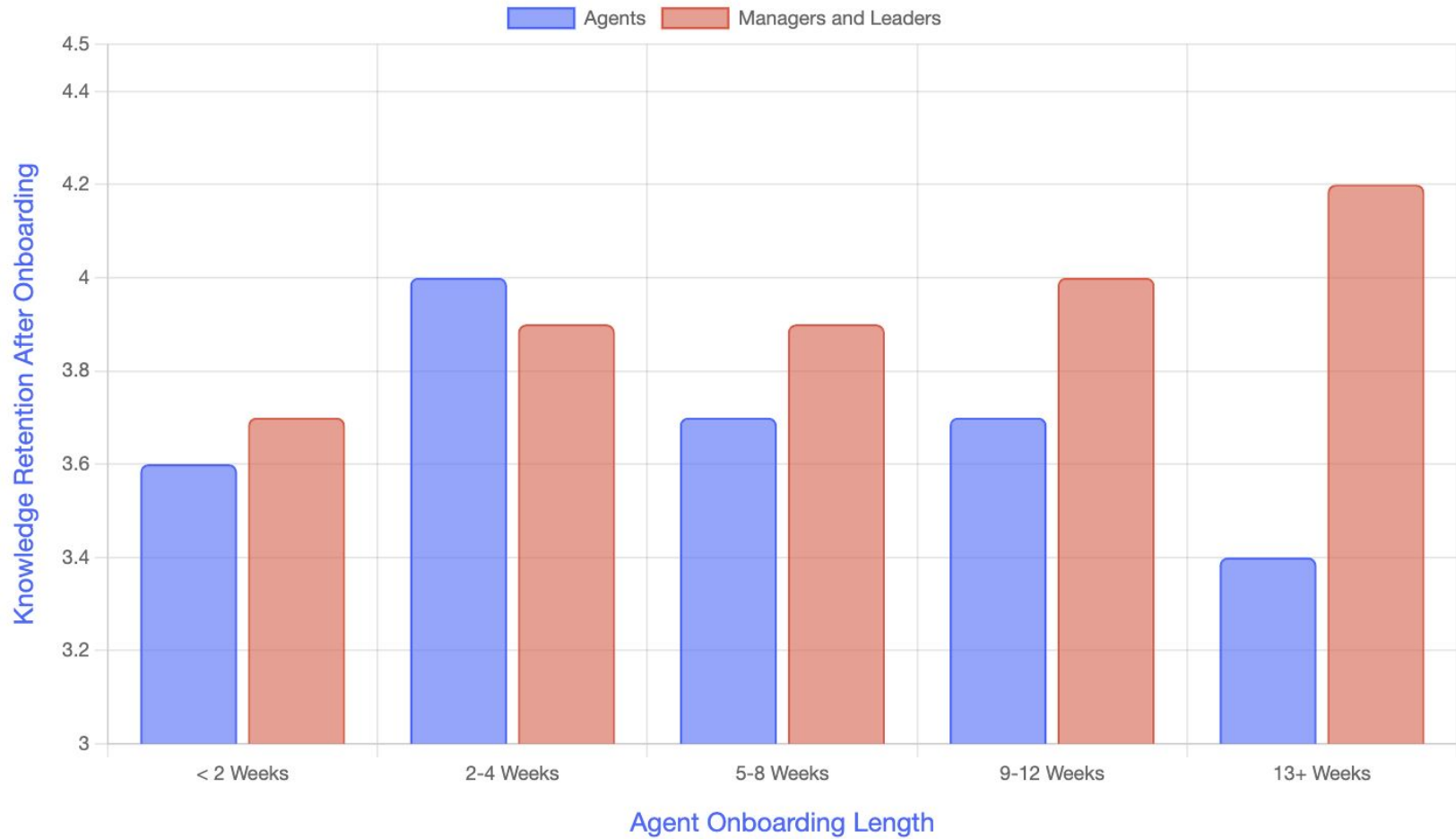
- ▶ Provide additional 1-on-1 onboarding support with peer mentors or onboarding buddies
- ▶ Engage or re-engage tenured agents in the process: win-win-win
- ▶ **91%** of employees who have a mentor are satisfied with their job — compared to 40% of those who do not



The Knowledge Retention Disparity

Differences in Perceptions of Agent Knowledge Retention

- ▶ Leadership often overestimates the success of their onboarding program
- ▶ The average agent onboarding knowledge retention was rated as **3.7/5**
- ▶ VPs and Presidents reported knowledge retention at **4.1/5**
- ▶ Supervisors are closest to the agents' day-to-day. They rated knowledge retention at **3.8/5**





**Put Your Managers &
Supervisors in Charge**

- ▶ Highest knowledge retention (**3.8/5**) was achieved when managers and supervisors led onboarding
- ▶ Lowest knowledge retention (**3.1/5**) was achieved when executive led onboarding



Executive Participation in Onboarding



**Introduce
Employees to
Company
Culture**



**Welcome
Employees In a
Personal Way**



**Show That
Leadership is
Available &
Transparent**



What Agents (And Leaders) Have to Say

What is one thing you would change about your company's onboarding?

- ▶ **64.5%** of agents wanted to change something about their onboarding
- ▶ The top 3 changes were:
 - Longer (17.2%)
 - More 1+1 attention (11.8%)
 - More engaging content (11.8%)

What is the most important thing to get right during onboarding?



Agent Preparedness (35%)

“Proper training on realistic situations” &
“Role play as many situations as possible”



Service Importance (23%)

“Customer courtesy and listening skills”
and “Working on communication
techniques”



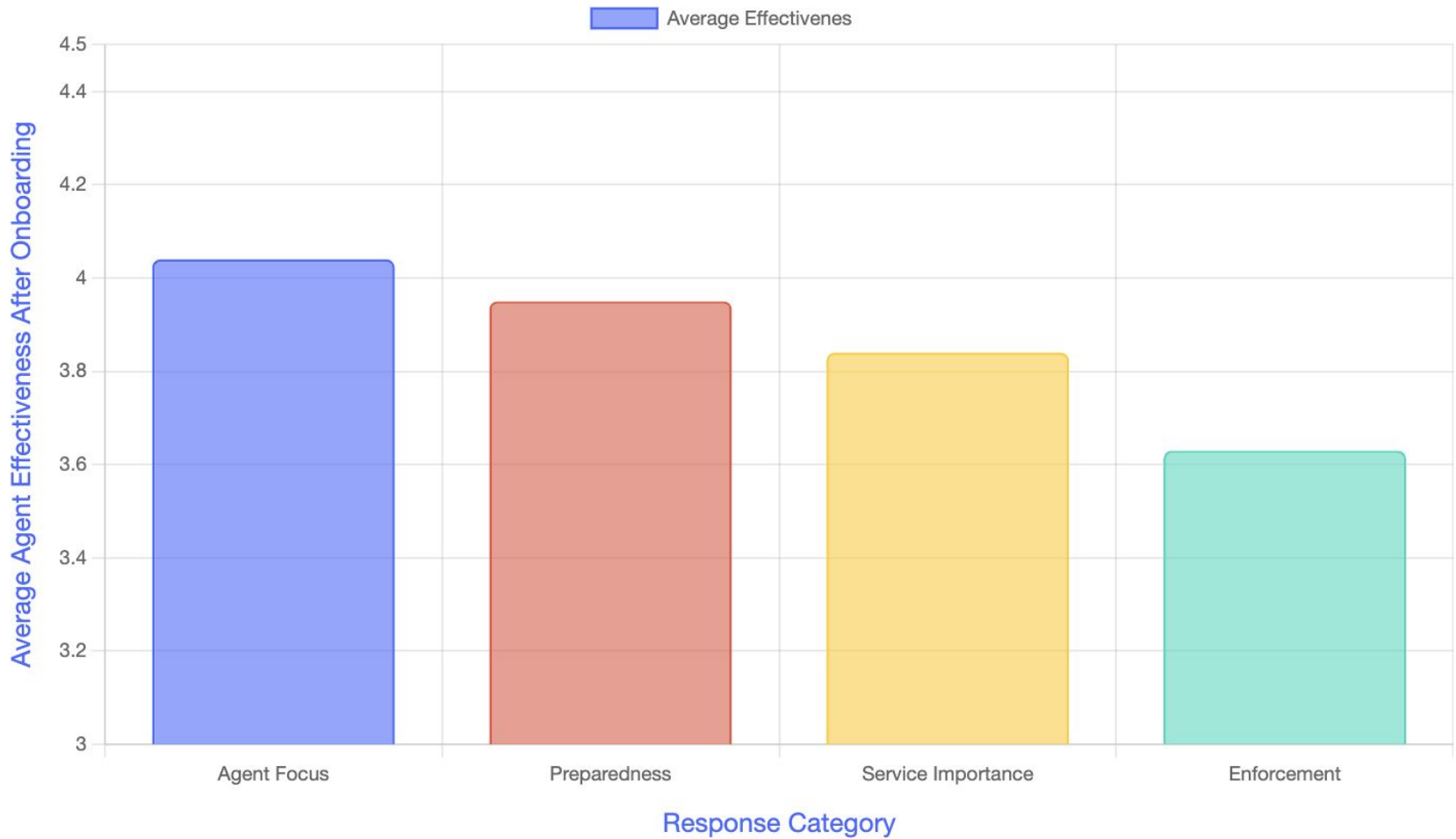
Agent Focus (26%)

“Make new employees feel wanted” &
“Make sure they feel comfortable”



Agent Enforcement (16%)

“Properly scrutinize them” & “Make sure
they get a good grade on preliminary
exams”.



Actionable Takeaways

Survey Your Team

How is your current onboarding working (or not working) for your trainers and employees? What are the issues?

Audit Your Tools

What tools do you use for your onboarding? Are they the tools that agents and leaders view as most effective?

Bet on 1-on-1 Training

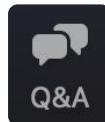
Consider setting up a peer mentor or onboarding buddy program to supplement the 1-on-1 effect.

Stay Agent-Focused

Agents want an engaging, interactive onboarding that focuses on them & their growth — not on enforcement.

Thank you!

Q&A



Use the **Q&A button** on your screen to submit questions.



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For more information about Balto and the Conversation Excellence Lab, visit **balto.ai**

Sources

- ▶ [Inside the Mind of Today's Candidates](#)
- ▶ [10 Simple Ways To Improve Onboarding For Increased Retention](#)
- ▶ [Technology Can Save Onboarding from Itself](#)
- ▶ [Onboarding Can Make or Break a New Hire's Experience](#)
- ▶ [Contact Center Attrition: What Agents Want in 2022](#)
- ▶ [Nine in 10 workers who have a career mentor say they are happy in their jobs](#)
- ▶ [8 Practical Tips for Leaders for a Better Onboarding Process](#)
- ▶ [2021 Contact Center Agent Survey Report](#)
- ▶ [We Surveyed 500 Managers About Call Center Coaching. Conclusion: It's Not Working.](#)