

## **Case Study - Fortis Health: Implementation of the Banks & Dean Integrated Screening, Selection and Process Management Solution**

### **Situation before engaging with Banks & Dean**

Fortis Health employs approximately 200 CSRs in two call centers providing inbound customer service. The larger of the two centers was experiencing unacceptable levels of turnover. Call center management also wanted to improve overall performance and service availability levels among existing CSRs, while at the same time hire CSRs who would be motivated by the new pay-for-performance environment. Many CSRs reported in exit interviews that the call center job was “much too structured”, or “too stressful”. In other words, they were not a “good fit” for the job, nor was the job a “good fit” for them.

In addition to these challenges, human resources was pressed to find enough qualified candidates to fill 9-week training classes held throughout the year. HR conducted several job fairs each year, in addition to advertising on job boards and newspapers. Staffing agencies were also employed to find enough candidates to fill training classes.

Supervisors and call center managers were spending several hours every week sorting through resumes to help HR identify potential candidates. Candidates were asked to fill out a paper application form at the HR office prior to being interviewed. HR sourced the paper applications and subsequently telephone-screened the chosen candidates. Call center supervisors completed the face-to-face interviews. Despite the screening efforts, Supervisors were spending unproductive time interviewing unqualified candidates. The Supervisors’ estimated hiring ratio was 1 CSR hired for every 5 interviewed.

Additionally, hiring criteria and processes were inconsistent between the two call centers. Because HR was paper driven there was no system in place to track or measure either the effectiveness or the efficiency of the call center recruiting drives.

Training class instructors were concerned with the lack of quality candidates.

Management was looking for a call center specific solution that could address these challenges in order to improve overall attrition and performance.

### **The Banks & Dean Solution**

Banks & Dean Integrated Screening and Selection and Process Management Solution was engaged as part of an overall call center specific retention strategy that included the following objectives:

- Decreasing turnover
- Increasing the pool of qualified candidates
- Creating a more efficient and consistent recruiting process
- Developing a more effective process for selecting quality candidates
- Improve training results

Banks & Dean partnered with call center management and human resources to determine the differences between “*screening*” and “*selection*” criteria. A tailored, web-enabled, screening and selection system was created for the company using Fortis Health’s call center criteria and Banks and Dean’s proven methodology. The career web site was designed with the look and feel of Fortis Health’s. In addition, it presents the job application opportunity to the candidate in a professional and user-friendly manner.

The online screening application process has made it easy for the candidate to:

- Learn more about the position; self select in/out and apply 24/7
- Be screened automatically
- Receive immediate feedback about next steps in the process.

From the call center's perspective, this approach has captured talent 24/7 and when the candidates are ready and interested. Three months after the site went live, approximately 1600 people applied for the CSR position and 800 passed the screening portion. No additional staff was required to manage the increase in applicant flow and resume sourcing time was eliminated from the process. The call center achieved its goal of developing a pool of qualified candidates from which to choose the best talent.

Banks & Dean incorporated a "Communication Assessment" and a second level telephone screen. This additional screening step further qualifies candidates for selection.

For selection purposes, Banks & Dean applied their 3-step selection process: use of the Quality Service Profile, behavior based interview and fit interview. For the behavior interview component, Banks and Dean identified the competencies required for the CSR position, developed the behaviorally based questions and trained supervisors how to interview more effectively.

Since retention is highly related to fit, Banks & Dean determined how best to interview for good "job fit". "Job fit", involves matching the requirements of the position and culture to people who demonstrate the potential to be successful in those set of circumstances. In this case, a good fit would require people who are more comfortable in environments that are very structured and often stressful.

A benchmark study was also completed in which a large sample of top, middle and bottom performing CSRs were assessed online, using the Quality Service Profile (QSP), a psychometric assessment that measures a person's propensity for customer service amongst other qualities required to be a successful CSR. The QSP was administered after clearly identified differences in top versus middle and bottom performers. The ranges of those success attributes, as measured on the QSP, were integrated into the selection system

Below are some examples of the findings from this benchmark study.

Discriminant function analysis was used to classify individuals into correct categories of performance, determining how effective the Quality Service Profile predicted CSR performance at different levels.

For Weighted Calls per Hour:

75% of the time the QSP identified a low performer as low.

85% of the time the QSP identified a high performer as high.

For Quality Assurance:

78% of the time the QSP identified a low performer as low.

82% of the time the QSP identified a high performer as high.

From this benchmark study, we derived the appropriate ranges for success attributes of CSRs in this environment and integrated the information from the Quality Service Profile into the selection process. In other words, Banks & Dean used the company's own performance data to identify the candidates who would most likely function as high performers in that company's particular call center environment.

Within three months of the system implementation, the organization experienced the following results:

- Supervisors and management no longer had to spend time sorting resumes.
- The qualified candidate pool dramatically increased to 800 in three months.
- Only job boards and newspaper ads were used; job fairs or staffing agencies were no longer utilized
- The call center currently has access to all information on candidates and the recruiting/hiring process and can use this information to make better selection and hiring decisions.
- Hiring ratios for supervisors went from estimated 1:5 to 1:3.

- The trainers' evaluated the first class hired using the new Integrated Staffing Solution, as one of the most qualified classes.

The leaders of the call centers, Laree Daniel, SVP, Customer Operations and Georgann Kincade, VP Call Center, have been the driving force behind the commitment towards operational excellence. They achieved a reduction in turnover from a year-end rate of 90% in 2001 to a turnover of 52.7% in 2002 to a year to date turnover of 5% in 2003. This continuous reduction far exceeds industry standards.

"Banks and Dean was a strategic partner in a focused effort to decrease unwanted attrition and increase the ability to hire the best qualified candidate cost effectively. Additional efforts we engaged in included; implementing multiple retention programs, moving the call center to a new state of the art environment, providing structured performance management training to all management personnel, and revising the training curriculum. The combination of all of the internal efforts along with implementing the Banks and Dean Integrated Solution has helped us begin to achieve our goal of exceeding the industry standards in call center retention. As a matter of fact, employees actually tell us now that they enjoy working in the call center and would recommend this job to a friend. This is exactly the environment that we were working towards creating " according to Georgann Kincade.

According to Samuel Buckner, Director of the Fortis call center in Milwaukee, "In 2002 significant improvements in attrition were realized as we began to work with Banks & Dean consultants who specialize in the science of screening and hiring for call centers".

	2001	2002	2003 YTD as of April
Year end rate of turnover	90.20%	51.90%	5.22%

Managements' expectations regarding the Banks & Dean Integrated Screening and Selection Solution were exceeded on all objective measures. The Banks and Dean solution is on track to provide a complete return on investment within twelve months of implementation according to all current statistics.