



Building Fluent Performance in a Customer Call Center

by Carl Binder and Lee Sweeney

More than a decade ago, an article in this journal described a methodology for building fluent sales knowledge with results so dramatic that response to the article eventually led to adoption of fluency-based training by sales and marketing organizations in nearly a dozen industries (Binder & Bloom, 1989). Newly trained sales representatives were able to handle complex customer scenarios with greater flexibility and confidence than tenured reps who had not been trained with fluency-based methods. Response to the original article also led to the creation of a company devoted exclusively to designing and delivering performance systems based on that methodology (Product Knowledge Systems, Inc.).

Some companies introduced to fluency-based sales knowledge development in the 1980s and early 1990s continue to apply this model as a standard for new hire and product launch training. Decades of research and application outside of corporate training (Binder, 1993, 1996; Bucklin, Dickinson, & Brethower, 2000) show that the fluency-based approach offers a new paradigm for performance improvement that combines the sensitivity of time-based measurement (Binder, 1993, 2001) with a focus on information ergonomics and a systematic methodology for designing and implementing efficient practice activities.

What Is Behavioral Fluency?

Technically, fluency is the combination of accuracy plus speed in responding that comprises competent performance (Binder, 1996). In practical terms, fluency is correct responding without hesitation, knowing something by heart, or smooth, confident performance (Binder, 1990). Fluency standards are ranges of performance (count per minute, duration, or pace of correct performance) determined by a variety of empirical means (Binder, 1989) and used as goals in learning or performance improvement programs. More than 30 years of research and application with a broad range of skills has shown that achieving these ranges of speed and accuracy optimizes *retention* of new learning, *endurance* (or resistance to distraction), and *application* (or transfer) of component behavior to more complex performance (Binder, 1996; Bucklin, Dickinson, & Brethower, 2000).

Fluency development is a complete system of principles and procedures covering analysis, design, development, implementation, and measurement of results (Binder, 1999). Key differences of fluency development from more traditional instruction include the following:

- **Measurement:** Fluency-based methods include the *time dimension* (count per minute, duration, or pace) in measurement of skills and knowledge. Conventional training methods generally use accuracy-only measures,

which are highly insensitive to differences between expert and non-expert levels of performance.

- **Criterion referenced:** Fluency-based instruction is always criterion referenced, requiring learners to achieve time-based fluency standards as they progress through learning sequences. Most current training programs in sales, customer service, and other areas of corporate development do not employ a criterion-referenced approach.
- **Information ergonomics:** Fluency development stresses the use of job aids, reference documents, online tools, and user interfaces that support performance speed and efficiency. It aims to replace environmental obstructions to fluent performance (fluency blockers) with performance enhancers (fluency builders) and provides explicit practice to ensure optimal efficiency in use of tools and resources (Binder, 1990, 1993).
- **Analysis and design:** Fluency-based designs emphasize identification of *behavior components* that must be *fluent* in order for composite behavior to achieve fluency. Conventional learning designs generally stress establishment of prerequisite sequences of skills and knowledge without attention to component fluency. This often results in development of behavior chains or sequences in which critical skill and knowledge elements are not fluent. Such nonfluent components can prevent learners from achieving fluent application (Binder, 1999). By developing component fluency, it is possible to build complex and flexible repertoires for application and adaptation to new situations.
- **Stages of learning:** As shown in Figure 1, fluency-based methods generally attempt to minimize *initial learning* (Stage One) using efficient instruction and job aids. They allocate the most time for *practice of critical components* (Stage Two) to build a strong foundation that supports easy *application* (Stage Three). Conventional methods often allocate most time to initial learning, provide minimal practice on components, and frequently expect most learning to occur in realistic application exercises and scenarios, which learners often find difficult to complete in the absence of a fluent foundation.
- **Implementation:** To maximize practice of critical behavior components, fluency-based training environments often resemble high-energy learning gyms more than conventional classrooms. When they involve a self-study component, fluency programs generally include incentives designed to maximize practice time and reward achievement of fluency. In general, a great deal of fluency-based learning activity is arranged in

brief (15 seconds to 2 or 3 minutes) timed practice intervals aimed at achieving specific fluency ranges on knowledge or skill components. During the practice phase of fluency-based programs, learners are encouraged to take responsibility for their own progress rather than relying primarily on instructors.

While the specifics differ from one program to another, fluency development generally appears much more like athletic or performing arts training than traditional academic or corporate education.

We have all heard that championship athletes spend a great percentage of their practice time on fundamentals. In many sports, and in such disciplines as martial arts and dance, both speed and accuracy of form are essential aspects of

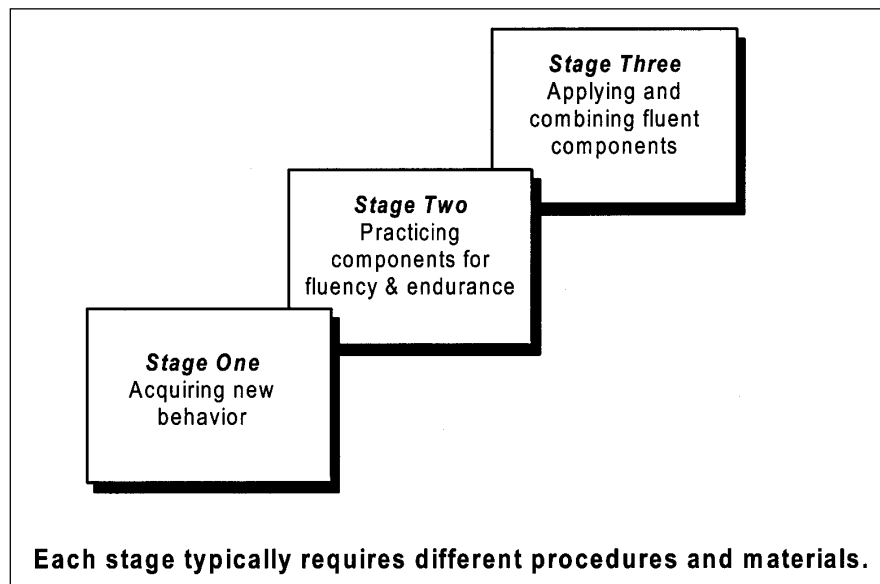


Figure 1. Three Stages of Learning.

mastery. Similarly, it is possible to set expectations and provide practice for speed and accuracy on *any* job. First, we break down skills and knowledge into component parts. This is similar to how a basketball player might work on various types of shots, fakes, and passes, or a martial arts teacher might arrange practice for kicks, strikes, and blocks. With practice on individual components, and then on combinations, all the parts begin to blend and leverage each other seamlessly to achieve peak performance. Step by step, this approach, if measured, fine tuned, and remeasured, will steadily increase both speed and accuracy in the basic skills.

Customer Care and Field Sales: Parallels and Differences

Design of fluency programs for customer care representatives has benefited from prior applications for sales knowledge development. The primary learning objectives for sales representatives generally include being able to ask and

answer specific types of questions, speak fluently about various topics, identify and categorize customer needs, link product features to customer needs, and perform other types of verbal discriminations, expressions, and associations. These are similar to a subset of objectives required for fluent customer service. The extraordinary results that we achieved with sales representatives (for example, new trainees were more proficient than five-year veterans) were due to fluency practice in which trainees achieved second nature recall of key knowledge elements required for application, and the ability to combine those elements into fluent dialogs, descriptions, presentations, and problemsolving.

In addition to the knowledge objectives similar to those for sales, customer service performance generally requires the ability to fluently navigate and use online systems to obtain specific information, and to complete and record details from customer transactions. This represents another opportunity for building fluency during training to accelerate performance ramp-up on the job. In most customer care training programs, trainees receive reference manuals or online resources, knowing they will need to master using them during initial weeks on the job. Seldom, however, do they receive sufficient practice to use these resources *fluently* from the first day at work to locate the right information quickly, sometimes under duress.

It is important to analyze and design for both system navigation itself and use of the information in online systems. Customer service representatives in one company entered service and complaint codes into online transaction records. They also read and interpreted those codes when diagnosing customer problems over the phone. With approximately 100 such codes, most representatives spent time on virtually every call for the first several weeks looking up the codes in online reference lists to enter or interpret them in

customer records. This activity required a minimum of 20–30 minutes per day per representative for the first three weeks on the job. Simply achieving fluent knowledge of these codes *prior to beginning the job* could eliminate the need to look them up, adding perhaps two hours per week to productive time devoted to interaction with customers. Similar or greater potentials for improving productivity ramp-up exist in such performance elements as achieving rapid, accurate point-and-click use of customer service software and internal website pages.

Using Learning Channels to Specify Objectives

Using *learning channels* to specify objectives was an important development in early applications of precision teaching (Binder, 1996; Binder & Watkins, 1990; Lindsley, 1997), a methodology that led to the emergence of fluency-based instruction. The language of learning channels provides a simple, concrete set of terms that describe the types of input and output for a given activity. Figure 2 shows learning channel inputs and typical outputs, plus a few examples. By attaching learning channels to objectives, we make performance descriptions completely unambiguous, a necessity for accurately analyzing performance deficits, precisely designing learning materials and procedures, and measuring performance during learning. Sample objectives presented in this article include learning channels.

Typical Fluency Development Activities for Customer Care

Figure 3 lists some typical practice activities and fluency standards for customer care training. While this is not a complete list, it includes examples from a variety of different types of customer service training, including service quality, system navigation, and component knowledge needed on the phone.

INPUTS	TYPICAL OUTPUTS	LEARNING CHANNEL EXAMPLES
See	Say	See/Say to read words from a job aid
Hear	Write	See/Mark to select choices on a discrimination worksheet
Smell	Mark	See/Say to answer questions presented on practice cards
Touch	Click	Hear/Click•Say to report requested info from the intranet
Taste	Abbreviate	Free/Abbreviate to brainstorm ideas for later discussion
Free		<p>Notes</p> <ul style="list-style-type: none"> • Free as an input means there is no external stimulus for each response (e.g., brainstorming). • When there are combined inputs or outputs, the convention is to use a dot, as in Hear/Click•Say.

Figure 2. Components of Learning Channels.

Notice the range of learning channels related to the types of performance required. Also, notice possible trade-offs in design. For example, using worksheets to practice system navigation (see/write) allows more independence for the learner but imposes a relatively low limit on the pace at which the learner can respond. Practicing with a partner (hear•see/say) does not require the learner to take his or her eyes off the screen or to write answers on a sheet, and therefore moves more quickly.

A Case Study

Background

An early application of fluency-based training methods in a customer call center occurred at the Los Angeles Cellular Telephone Company (now AT&T Wireless). In one business unit representatives made calls to high-value customers to ensure that their service and billing rates were optimal and to address any questions or issues that the customers might have. The job description for these retention representatives was a hybrid, combining features of both sales and customer service.

An unusual and particularly advantageous aspect of the situation was that new hire training was developed and delivered

under the direct supervision of the business unit manager, his supervisors, and lead representatives. Unlike more traditional settings, in which a separate training staff delivers classroom training, in this unit the supervisors and lead representatives who later managed the newly hired representatives actually designed and delivered the training program. This allowed for tighter accountability than is common in more traditional training settings, as well as a smoother transition from training to the job.

Revising a Conventional New-Hire Program

After attending a FluencyBuilding™ Workshop, the business unit manager worked with a team of supervisors to radically revamp their new hire training program, aiming at a design that would more resemble a basketball coaching program than classroom education. The team conceptualized program content as falling into one of three concentric circles of a bullseye, as shown in Figure 4. At the core are fundamental bits of skill and information that must be automatic, or fluent, for optimal performance on the job. In the intermediate circle is information required for performance that need not be committed to memory as long as representatives can look it up fluently. The outer circle contains nice-to-know information previously included in

LEARNING CHANNEL	PERFORMANCE STATEMENT	FLUENCY STANDARD
See/Say	Respond to practice cards with key facts, terms, and associations	60-80 per minute, with one or no errors
Hear/Say	Respond to questions or prompts from facilitator or partner on same content as covered by practice cards	15-25 per minute correct
See/Mark	Mark codes on worksheet for billing, complaints, service type, and other purposes to indicate type of code (discrimination of types)	35-45 per minute with no errors
See/Say	Say code for type of complaint, billing problem, service type, etc. listed on front of practice card	60-80 per minute
Hear/Say or See/Say	Respond to questions or objections read from cards or stated by partner, covering key points accurately, succinctly, and clearly	Normal, confident speaking pace
See/Click•Write	Navigate customer care intranet to find and record specific product and procedure information requested on worksheet	5-10 per minute correct (or as fast as system will allow)
Hear/Click•Say	Navigate customer care intranet to find specific product and procedure information requested by partner	10-20 per minute correct (or as fast as system will allow)
See/Mark	Find opportunities for improved language in transcript of interaction with customers, focusing on quality criteria used to evaluate service quality	8-12 per minute
Hear/Say	Rephrase fuzzy statements of customer problems or customer inquiries read by partner from cards	Normal, confident speaking pace; correctness judged by partner

Figure 3. Typical Fluency Practice Activities for Customer Call Center Training.

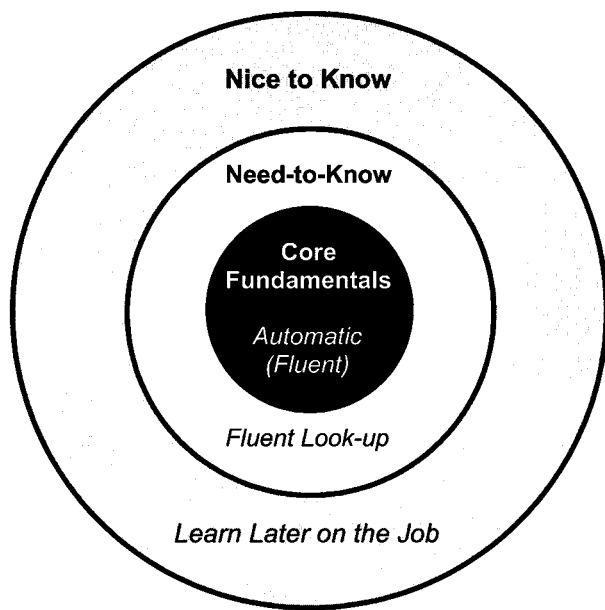


Figure 4. The Development Team's Bull's-eye Model of Course Content.

training, but judged by the team to be unnecessary for new hires. They completely eliminated the latter from training, expecting that reps would learn it later on the job.

One of the first challenges in a fluency-based approach (as in many performance-based methodologies) is to define what is truly crucial for the job. Those are the core areas. The goal here is ensuring that the trainee becomes *excellent*: proficient, fast, and accurate. This is what any company, trainer, manager, or trainee would desire. However, the more traditional approach often seeks to cover all the information, despite the result that the trainee will likely be exposed to more than he can retain or will need to survive during initial weeks on the job.

After eliminating a substantial amount of content supervisors judged to be unnecessary, the team converted core content to practice cards, written exercises, and group hear/say drills. They redesigned paper job aids and reference tools to allow rapid access and easier scanning while on the phone, in some cases simply by increasing type size to allow read-

ing with peripheral vision. Finally, the team consigned important information to look up exercises in which trainees practiced finding content until they could do so quickly and confidently.

The approach the team took in revising the training program was more a rapid application development process than a traditional instructional systems development effort. Supervisors and leads revamped the program on weekends and evenings over a two-week period, producing a quick-and-dirty revision that continued to change from day to day during the first few iterations of the two-week training course.

A Shift in Time Allocation and Level of Activity

Following recommendations from the FluencyBuilding™ Workshop, the team aimed to shift time allocation during the program so more than half the time would be spent on fluency practice. Figure 5 summarizes changes in the approximate amounts of time devoted to different types of activities before and after the program revision.

Given these changes, the classroom became noisier, even boisterous at times, but it was definitely more engaging than before. Part of the philosophy that developed among the program delivery team included principles such as the following:

- Boredom is our enemy.
- Participants should be afraid to leave for an unscheduled bathroom break because they might miss something.
- If you see participants settling back into their chairs throw them a curve ball to get them back on the edges of their seats.

Brief content presentations preceded clusters of exercises that shifted from one type of practice and measurement activity to another, often unpredictably. Trainers, who functioned as fluency coaches, set high expectations and maintained high levels of activity and focus throughout. Figure 6 shows the sequence for a typical hour of training. At the end of eight such hours, trainees typically reported that they felt good rather than bored or fatigued, much as one feels after a good physical workout. To maintain this level of activity for

PROGRAM ACTIVITY	BEFORE REVISION	AFTER REVISION
Classroom lecture	70%	25%
Observe tenured performers in classroom	10%	0%
Review and application of job aids	10%	15%
Fluency practice exercises	0%	55%
On-the-job training	10%	5%

Figure 5. Approximate Percentage of Total Program Time for Each Activity Type.

TIME	ACTIVITY
15 mins	Lecture/discussion
3 mins	2-minute quiz (See/Mark) on content from lecture
3 mins	Coach prompts choral responding (Hear•See/Say) of correct answers, corrects or explains errors, and writes answers on board.
4 mins	Coach prompts and writes count per minute scores on board, while trainees record own performance on recording sheet.
3 mins	Coach erases answers from board and asks class for choral responding to quiz questions in random order (Hear/Say).
10 mins	Lecture/discussion continues.
5 mins	Coach instructs trainees to rapidly recall and write down (Free/Abbreviate) as much as they can recall in 2 minutes.
3 mins	Coach prompts trainees to say what they wrote; writes their responses on the board. Coach clarifies answers as needed.
5 mins	Lecture/discussion resumes.
5 mins	Coach asks trainees to do a 1-minute timing on practice cards (See/Say) covering content included in lecture. They record scores and say them aloud so coach can record them on board.
4 mins	2-minute See/Mark quiz on content from this hour, with correction.

Figure 6. Typical Sequence of Activities for One Hour of Fluency-Based Training.

two weeks requires a carefully defined core curriculum, detailed daily training plans, and rotating coaches to sustain peak energy.

Setting Expectations

Because a fluency-based program is quite different from a conventional training program, setting expectations for participants is extremely important. In this case, the business unit manager, head supervisor, and several lead representatives were present at training sessions and responsible for delivering the training. Because they were involved in day-to-day management of trainees, they were able to set expectations for performance in a manner and with a degree of credibility that dedicated trainer-facilitators often find difficult or impossible to do.

The business unit manager did far more than deliver the obligatory kick-off message: He set the tone from the beginning, explaining to trainees in clear, simple language how the program was different and why. A humorous but accurate message in his kick-off presentation was an apology to the trainees that “most of the core information that you will see, hear, and say in practice will become like

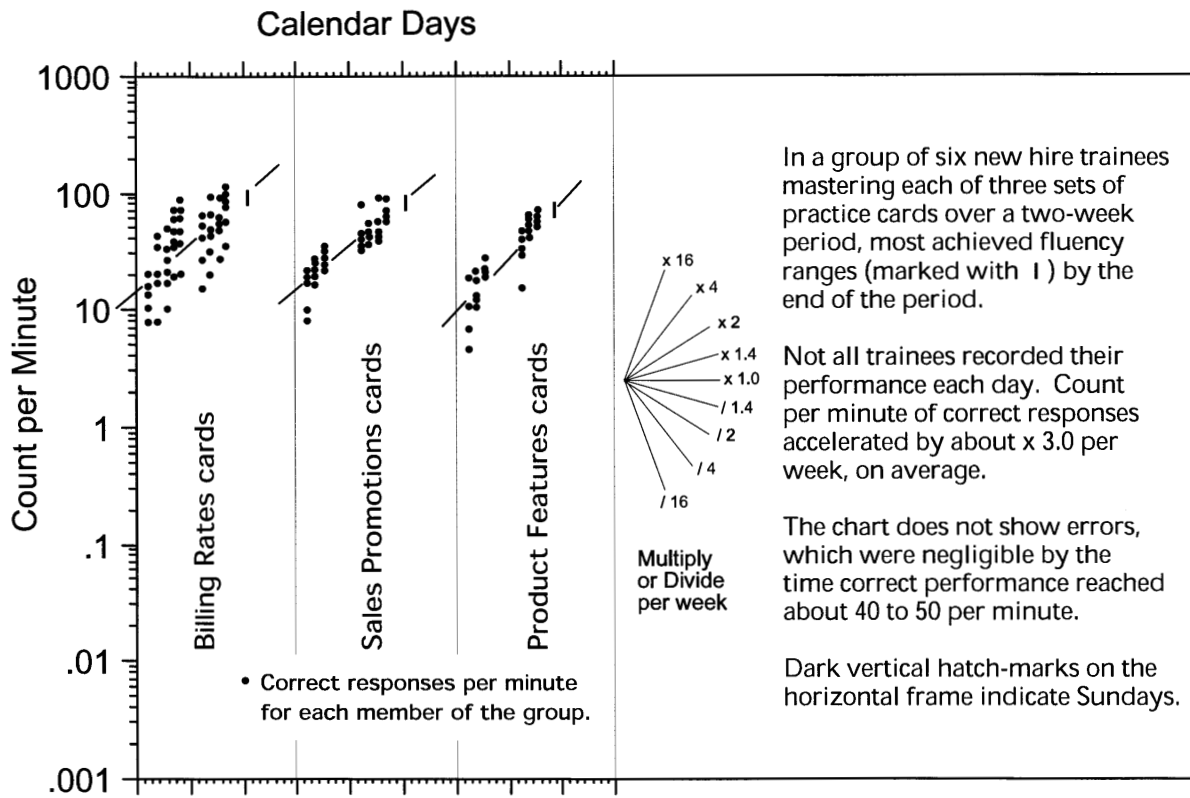


Figure 7. Acceleration of Correct Performance During Practice.

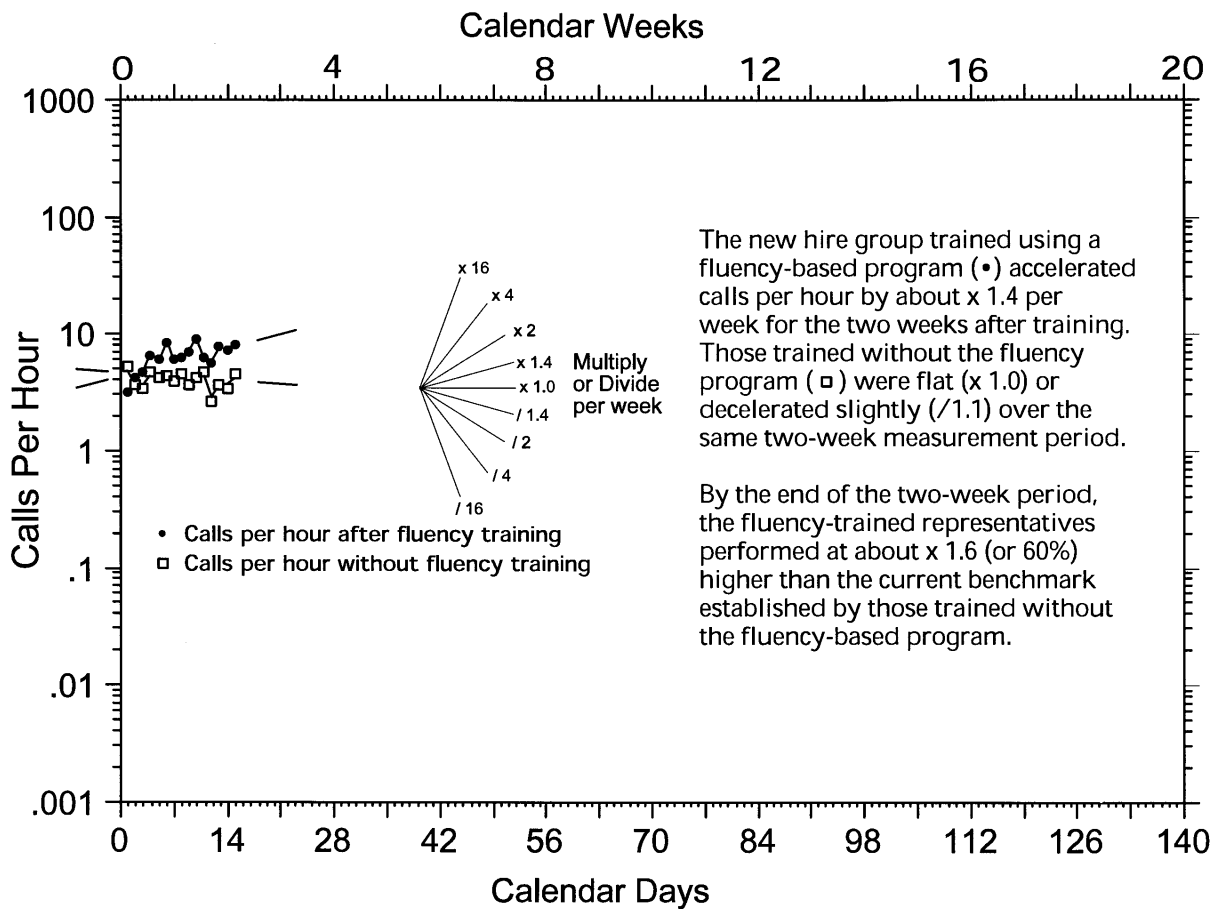


Figure 8. Ramp-up To and Beyond Benchmark Productivity.

riding a bicycle, you will *never* forget it!” He also described how the fast-paced program matched the energy level and business objectives of a call center. The supervisor followed by setting the expectation that trainees would “perform at 110%” in training and on the job and by encouraging trainees who did not feel up to the challenge to discuss with him other possible other job opportunities within the company. Finally, experienced lead representatives served as fluency coaches, setting high expectations, encouraging, prompting, praising, and generally pushing trainees to achieve their personal best each day during the 10-day program. They worked to make the training challenging, focused, and fun.

Measurement and Feedback

As in sports coaching, measurement and feedback are essential to fluency development. Most fluency-practice exercises involve timed measurement of correct and incorrect performance as part of each practice session. Consequently, both learners and coaches know at every point in the process how each individual is performing, when they need help or suggestions for altering amount or type of practice, or whether they need added incentives, prompts, or corrective feedback.

In this case, fluency coaches set daily fluency goals for each exercise and monitored individual performance against those goals. Each time an exercise occurred in the classroom, learners recorded their own performance on recording sheets, and coaches often asked them to report their performance on prepared flip charts. Coaches arranged informal rewards and recognition, various competitive games, and prizes for achieving personal best performance or group records. Like a well-coached basketball team in scrimmage, the group responded with energy, drive, and hard work.

Unlike traditional tests that learners often face with fear and anxiety, measurement of performance in fluency exercises is often an energizer. When trainees can see short-term gains in performance within a single day, and from day to day, their interest and energy skyrocket. The common fear of traditional trainers, that “all this measurement will just intimidate people,” always proves wrong after the first few days in a fluency-based program, because trainees begin to thrive on their own improvement and the challenge to achieve high aims.

PREVIOUS TRAINING MODEL	FLUENCY-BASED TRAINING MODEL
<ul style="list-style-type: none"> • Lecture based • Facilitator dependent • Train on everything • Passive learning • Final test is primary measurement • 100% accuracy measurement limit 	<ul style="list-style-type: none"> • Practice based • Trainee dependent • Focus on need-to-know fundamentals • Active learning • Continuous measurement and feedback • Both time-based and accuracy measures

Figure 9. Shift in Perspective.

Program Results

Figure 7 shows sample learning data for a group of trainees. Correct performance approximately tripled each week, and all participants eventually were able to perform within fluent ranges. Learning and performance on these practice cards fairly reflects levels and learning rates for the remainder of exercises in the program.

Figure 8 shows average calls per hour for the first group, compared with performance of all other representatives in the call center for the same period. Fluency-trained reps accelerated to the call center benchmark within a few days of training and progressed beyond to an average of 60% (1.6 times) higher than the call center benchmark within about two weeks. This unprecedented ramp-up to and beyond the call center benchmark level established a new expectation about what was possible for newly hired representatives immediately following training.

Figure 9 compares the original and revised training programs with respect to a number of features and highlights some of the qualitative changes observed during and after the program.

Among the unanticipated effects of the fluency-development program was a shift in responsibility from trainer to trainee for personal improvement. Without being told to do so, many began to practice on their own at breaks, before and after regular work hours, and at home. They were highly motivated to achieve and exceed levels demonstrated by others and to continuously attain personal best levels on the exercises.

Traditional lecture-discussion-application training programs produced trainees who seemed familiar with but were overloaded by a huge amount of information; their general appearance by the end of the program was often passive, disengaged, and drained. In contrast, those completing the fluency program seemed engaged and proactive, aggressive in their motivation for performance and new learning, and remarkably fast moving in everything they did. There was no sense of fatigue or overload, quite the opposite of trainees who had completed conventional training. That energy and excitement transferred to their first weeks on the

job, where they maintained the same pace, thus excelling at practically every task, including relatively complex applications and improvisations. For the first time, veteran representatives were asking new hires where to find certain information, and if *they* (the veterans) were going to be allowed to complete similar refresher training.

The high activity levels and the frequent and loud vocal participation prompted by choral recall and look-up exercises drew out the trainees' individuality and increased group camaraderie, setting the tone for a friendly and enthusiastic mood in the call center and on the phone with customers. Another qualitative observation is that, unlike traditional training where participants are often observed watching the clock, trainees in the fluency program frequently remarked at how quickly class time seemed to pass.

The revised program was actually shorter than the original, lasting about two weeks rather than three. Thus, another result of the program revision was a higher level of performance achieved in less time and with lower cost. This result, in particular, caught the attention of other managers in the organization.

Conclusion

Fluency development combines a number of characteristics of the best performance-oriented training (for example, use of job aids, focus on need to know) with design and implementation features that are quite new for most corporate managers and trainers. Not only do fluency-based programs challenge participants and facilitators/coaches to higher levels of activity and achievement (fluency); they also result in more rapid ramp-up to performance on the job, often enabling new hires to surpass previously established performance benchmarks.

The dramatic improvements in learning rates, performance levels, and program efficiency that fluency-based programs in sales, customer care, and other applications demonstrate suggest a large potential for improving the effectiveness of education, training, and coaching programs. Fluency-development methods are firmly grounded in more than three decades of scientific research with broad application in both

children's education and adult training and development. In view of the evidence, managers and performance improvement specialists cannot afford to ignore fluency-based methods in any overall performance development strategy. ▲

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