

# **Needs Assessment**

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*In partnership with*

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Human Resource Management

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<b>Company:</b> Scotiabank Atlantic Contact Centre	<b>Position:</b> Customer Service Officer
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**Concern**

Poor customer Service

**Importance of Concern**

Poor customer service can cause loss of customers and/or poor customer relations. This can have a negative impact on the overall image of the bank and also a loss in revenue.

**Stakeholders**

Management across all levels recognizes the importance of customer service, and places emphasis on developing customer service skills in the initial onboarding training and throughout the employee's time at Scotiabank. Customer Service is seen as Scotiabank's biggest strength, and the company places a lot of emphasis on customer service as a performance target for their employees through the use of surveys.

**Organizational Analysis**

The organizational strategy of Scotiabank is a combination of cost reduction and quality control. The bank is growing their Contact Centres, while cutting jobs at the branch to control their costs and increase productivity. This also allows the bank to have a standardized process to deliver consistency to the customer by having the same processes and procedures within the Contact Centre and is easier to manage, as a large amount of employees are located within fewer locations.

**Organizational Strategy Related to Training**

The training provided by Scotiabank is reflective of the organizational strategy. Initial training completed prior to on-floor work is provided to staff in groups of 8-15 people. This supports their cost reduction strategy by training staff in bulk, reducing the amount of individual time needed for training. It also falls in-line with their quality control strategy, ensuring that all staff receive the same training and are provided the same knowledge and information.

Once staff are on the floor in the job, there is one hour dedicated every two weeks per staff member to receive training or coaching tailored specifically to that staff member. The bank has only recently made this commitment to coaching/training time in support of their quality control strategy.

**Constraints of the Training Process**

The direct manager plays a crucial role in how well the training process goes. The manager needs to be able to identify appropriate training needs and methods of delivery. If they are not able to do this, then the effectiveness of the training provided will be diminished. If the method of delivery is determined to be shadowing another

staff member, issues can arise if that individual is lacking the needed qualities that the trainee is looking for.

### **Training Supports**

One-hour training is allotted for each staff member every two weeks and is individualized. The employee and the manager work together to identify areas that the employee is interested in improving. This is a significant commitment made by the bank to support the staff to improve and maintain their skills in knowledge. However, the downfall is that no needs assessment is run on what type of training will be most useful for each employee, and therefore much of the time spent training may not be productive or necessary.

### **Job Description & Task Analysis**

*See attached Job Description*

*See attached Task Analysis*

### **Conclusions**

The largest discrepancy we experienced in our data was between the manager's expectations of frequency, and the employees actual time spent on the task at hand. In many instances, the task was rated at a high frequency by the manager; for example, 7.5 hours spent over the shift on the task, or in other words it was expected to be done constantly throughout the day. When rated by employees, the same tasks were often rated at only 25-30 minutes a day, in some cases less.

Specifically, contributing to effective team morale and employee relations through positive interaction with team members and participating in the *Applause Program* was rated at 7.5 hours a shift, or a constant daily task, by the manager. Although, when rated by the employee it was often scored at a much lower frequency, as low as five minutes per shift.

This was often the case between employee and manager rating of frequency, and the category of frequency had the highest rate of discrepancy in our data by a large margin. Outside of the frequency ratings, the ratings for importance and competency level of the task in question were generally in line between manager ratings and employee ratings. The differences, if any, were within one point of the managers rating, except in specific and outlying instances. In these instances, the organization offers a coaching/mentoring program for employees who may require extra assistance following formal job training. This does not exist on a larger scale, and would not be adequate for dealing with larger scale training issues, but it functions well for the environment within the company.

Seeing as the importance of task rating and competency task rating were very close, if not the same between manager and employee ratings, training does not seem to be the overall issue causing customer service concerns on a larger scale. The issue seems to be surrounding the time expected to be spent on certain tasks, and the actual amount of time spent on the said task. This indicates that the issue is with the amount of work being given to individual employees. This is enforced by the ratings received where tasks which should be done all day (7.5 hours a shift) are only done for an hour or less, yet they are rated by both the employee and manager as highly important, just as important as tasks which have several hours or more dedicated to them. This shows that employees are being given work that they do not have the timeframe to complete, and have too much on their plates in a given shift.

In line with this is a list of tasks and responsibilities, which have no clear importance or priority over one another. They are all listed and viewed as equally important, and this makes it difficult for employees to prioritize what are the most pressing responsibilities assigned to them, and where to spend their time effectively. Much of the time that falls to the wayside is related to team support, cohesion and team-building duties. These are given much less time by employees, which is contributing to difficulties among the team, reducing efficiency and effectiveness, creating tension and conflict and therefore impacting the abilities of employees to deliver effective and quality customer service.