

Call Centre Communication: Measurement Processes in Non-English Speaking Contexts

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Abstract

This article looks at the English language communication problems that US companies are experiencing when off-shoring their call centres operations to non-English speaking destinations such as India and the Philippines. Specifically we explore the use of the quality assurance (QA) “scorecard” measurement by outsourcing companies of Customer Service Representative (CSR) English language communication skills when talking to native speaker customers in the US. Whilst companies claim great success with this scorecard at home in America, they are now complaining that it does not appear to work in countries where English is not the mother tongue. Specifically companies report that despite high scores achieved on the scorecard by offshore outsourced CSRs, there are many complaints from US customers related to language communication breakdown on the phones from these outsourced destinations.

This article first investigates the language and content of a typical scorecard. In the paper we outline an analysis of lexico-grammatical features found in the scorecard and compare these items used for assessment in QA procedures with what sometimes happens in reality. We draw on Systemic Functional Linguistics (SFL) (Halliday and Mattiessen 2004) and communicative competency framework (Savignon 2005; Canale and Swain 1983) as well as current approaches to communicative language assessment practice (Bachmann 1990; Douglas 2000). In doing so, the authors try to account for scorecard problems by arguing that in a workplace environment when the CSR is operating in a second language that this scorecard measurement suffers from an incomplete set of criteria for English language communicative competence. In other words, the QA measures which are in operation need to be developed through research based tools, drawing on the field of applied linguistics.

The article also builds on current research (Forey and Lockwood 2007) that describes the systemic functional features of a typical call centre transaction in a NNS context and where communicative competence breaks down. This approach has been useful in being able to track the ‘discourse flow’ of the call centre transaction and isolate where the communication flow becomes problematic.

This article calls for an interdisciplinary approach to English language communication QA measurement in call centres operating in NNS outsourced destinations by using existing frameworks and research in applied linguistics that are directly relevant to this problem. Finally the article outlines areas for further research and application.

Key words:

Call centres

Quality Assurance

Language assessment

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Speaking Contexts

Background

The offshore and outsourcing of business is a recent and expanding development in the business sector. It is estimated that the addressable market for global offshoring exceeds US\$300 billion, and in the NASSCOM McKinsey Report (2005) they estimate that by 2010, potentially this business will be worth US\$110 billion. In the NASSCOM McKinsey Report, it is suggested that only 10% of business that could be offshored has been realized so far. Thus, the potential for growth and the impact on language, business communication and globalization is immense (See Graddol 2006 for a review of global trends in English). Asia is the leading offshore destination (NASSCOM McKinsey 2005, Graddol 2006), and thus the implications for English language in this fast growing business sector need to be addressed.

The Business Process Outsourcing (BPO) industry, which includes offshoring and outsourcing business, is happening in all languages, for example a number of Spanish speaking call centres have been established in Mexico and Brazil, Japanese and Korean call centres in the northern parts of China such as Dalian, and India and the Philippines serve English speaking destinations such as the USA, UK, Australia and New Zealand. (Vashistha 2006). The focus of this paper is on English speaking call centres in Asia, and specifically, we refer to research carried out in the Philippines, where the growth of call centres is phenomenal.

The two most popular destinations, India and Philippines, now have between them over 250,000 customer service representatives (CSRs), mostly servicing the United States (NASSCOM McKinsey 2005). The majority of these CSRs are college

graduates, and outsourcing companies report improved quality of customer service due to the combination of graduate employees and a strong service culture in Asia (NASSCOM McKinsey 2005). The Philippines alone is expanding call centre employment at a rate of over 60% per year (Vashistha 2006) is set to continue. However, this rapid growth has exposed concerns that many offshore destinations may not have the necessary talent to support this growth. Sanez (2006:11) the CEO of the Business Processing Association of the Philippines (BPAP) talks of 'serious supply side constraints' and an 'insufficient quantity of "suitable and willing talent to fuel growth"'. The lack of confidence in both the country's ability to provide the necessary manpower is the major hurdle to the rapid development of call centres. Recruitment levels in the Philippines are running at 3%. A study conducted by John Clements, where they tested 2,524 graduating students, found that only 3% had the required skills for the call centre industry, and the biggest problem identified was their level of oral English Proficiency (Dominguez 2006:19). For example, in one large third party call centre provider they have on average 400 applicants a week, and only 1% of these would have the language skills required, and another 3-5% are what are referred to in the industry as 'near hires', i.e. with a little more training they would be at the level required for hiring (Greenleaf 2007).

From a political, economical and social perspective the call centre industry is extremely crucial to the development of a stable economy in the Philippines and providing useful training to future employees of this industry is essential. It is this emphasis on training within the context of the call centre which has motivated the present study to focus on the Quality Assurance (QA) techniques used. QA measures within the industry are used for performance and diagnostic purposes, they also act as a model for recruitment, and training. By investigating the QA measures adopted we

are able to understand specific features in the nature of the call and the way in which the organisation choose to interpret such assessment tools. Typically, companies have simply transferred training and QA material from the home country to the offshore destination, and are now finding that training materials developed for domestic employees in the US and UK may not be appropriate for these offshore destinations. The QA tools are particularly important in call centres s which provide customer service. While the performance of call centres s specializing in sales (outbound call centres) can be measured by objective numbers, servicing centres (inbound call centres) are typically assessed through Service Level Agreements (SLAs), which specify efficiency measures such as average speed to answer the call, average handling time (AHT) and also quality measures, such as CSATS (Customer satisfaction surveys) and local scorecards use for internal QA. The scorecard attempts to measure the ‘customer experience’ through an assessment of a real call, or a series of calls by a local QA assessor. A scorecard is a common form of measurement used in different organizations to assess the level of performance (Amaratunga 2002; Porter and Tanner 2004). As noted above, the scorecard is used to assess the individual CSR’s performance and to provide diagnostic information (Staples et al XXX). It is important therefore to know whether the QA measures probed in this scorecard are valid and reliable. However, little if any research has been carried out in the BPO industry, and specifically the use of scorecards in the call centres. To date the studies focusing on language in call centres tend to be undertaken in a context where the CSR and customer both reside in the same country (Cameron 2000a, 2000b; Adolps et al. 2004). Few studies have been carried out in these new offshore destinations (Forey and Lockwood 2007).

The problem

US companies are finding that simply lifting their domestic training programs and QA processes and dropping them into offshore NNES locations does not appear to work. This article argues that one of the main reasons that companies are experiencing training and QA difficulties in the outsourced environment is because the target NNES CSR operates in fundamentally different ways from the domestic native English speaking CSR. There are two questions connected to this:

1. What are the scorecards assessing with regards to communication?
2. How can US companies modify and adapt their QA scorecard processes to meet the specific needs of the NNES call centres CSRs?

The Philippine context

In the Philippines, English is taught as a second language in most schools and universities. Whilst the students' **knowledge of grammar** may be excellent (and often much better than their US counterparts), their knowledge of **how** this grammar and language is activated in real life exchanges is quite a different story. The range of registers the NNESs have experience with, will probably be quite limited. In the classroom situation, and second language contexts, the demands on the speaker, are quite different from the language experience of dealing with frustrated customers. Rather than personal and social contexts related to customer enquiries, the teaching of English in the classroom tends to focus on educational genres (see Macken-Horarik 2001 for an outline of genres found in education). For example within an insurance call centre context, the CSR is dealing with health related issues, bereavement and financial queries. Such real-life interaction has been under researched and the US NES customer's register and language choices in such contexts are probably beyond the experience of many Filipino CSRs. Thus it would be extremely difficult, even though the Filipino agent may have passed all their English language exams, to deal

with such registers where the language and cultural experience of the customer is markedly different. Knowing **about** language does not mean one is able to use it in a complex functional setting such as a call centres (Young and He 1998).

Why is it that NNEs find real life interaction with NES so difficult even though they have been receiving English language instruction from an early age at school? Put simply, this often relates to an approach to instruction in English through school and university where heavy classroom emphasis is put on **the form** of the language rather than **the function**. The context of teaching English in a developing country where resources are limited means that there is a higher dependency on written language and grammar rules, rather than on how language makes meaning in specific contexts, i.e. the goal and purpose of language as a socially constructed resource (see Martin and Francis 1997). Traditional language teachers too have the mistaken notion that grammatical accuracy is the cornerstone of good language use, whereas far more emphasis should be given to understanding how language changes depending on who is talking to who, what reality is being constructed and what channel of communication is chosen (Painter 2001; Martin 2001) offer a more detailed description of these register variables, field, tenor and mode. The outsourced call centres industry has become a victim of inappropriate English language teaching methodologies that have been prevalent in the school system in Asia for many decades now. Based on our research in the Philippines, we suggest that much of the English language training for the call centre industry is inappropriately focused on discrete grammar rules and accent neutralization which has little to do with the customer service interaction.

Call centres interaction which relies heavily on understanding the goal and purpose of

the call, being able to answer the customers query clearly and accurately, and a dynamic interaction with the customer in the desired manner via a telephone conversation is, an occluded genre. Success relies on CSRs knowing how to use language, to understand that language is a system of choices, and to make the appropriate choices which will satisfy the customer's demands, and which also fit the assessment criteria used in the scorecards.

This article first outlines recent trends in assessment in the workplace and then moves on to present and examine one example of a scorecard measurement tool. The scorecard is critically evaluated through a deconstruction of the language, goal and purpose of the assessment measure. We draw on current research (Forey and Lockwood 2007) to illustrate some of the weaknesses of the scorecard as a diagnostic tool for the call centre transaction and incorporate a systemic functional linguistic (SFL) theoretical position in our understanding of language and the meanings language choices make. Forey and Lockwood (2007) when outlining the genre of the call centre interaction provide an understanding of the text and the choices within the call centre interaction that are then seen to be at odds with the reductionist and structural paradigm reflected in the scorecard. Finally, we suggest an alternative model of assessment which has been developed against well known applied linguistic frameworks (Savignon 2005; Canale and Swain 1993). We briefly outline how this alternative model, Business Processing Language Assessment (BUPLAS) can be used for defining and assessing communicative competence. However, a detailed discussion of the development, design and testing of the BUPLAS assessment tool will not be addressed due to limitations of space.

註解 [ES1]: Jane will you check that we do this later in the paper?

What is a scorecard?

The scorecard is a form of Quality Assurance (QA) process which is frequently used in the workplace. Quality Assurance measurements have been researched and discussed in the business and management literature (see Amaratunga et al. 2002). In this particular context where the CSR are all using English as a second language, and the interaction on the telephone, the talk – the text, is pivotal to the success of the call. Understanding the role of language and assessing this communication is a key role in ascertaining the effectiveness, the training needs and the future requirements of the workforce.

The scorecard aims to assess product knowledge and communication skills during the telephone service interaction. The scorecard is administered on a regular basis by team leaders and QA personnel (e.g. trainers and coaches). The assessment is carried out by barging into (listening as a silent party) to live transactions, or by listening to recordings. Commonly in call centres people work in teams of 10-15 with one ‘coach’ and that coach will be expected to listen to an average of 3-4 calls for each team member a month. It is used for a QA purpose to provide judgmental data about the CRS performance which is then related to financial rewards, incentives and/or bonus and also more importantly for the business, whether the SLAs are being met. If a situation were to arise where an individual consistently performed poorly they could lose their job. Scorecards are also used for developmental purposes and provide information concerning training, coaching support and promotion.

The scores are also used to inform the organisation of overall performance. If a call centre is a third party provided, i.e. providing an outsourced service to a company then the scores from the scorecard are part of the Service Level Agreements (SLA). It is common policy that the host company will expect SLA’s of certain levels from their

provider. If the average score from the scorecards does not reach the SLA then a provider could lose their contract with the host organisation.

Methodology: Language and assessment in the call centre industry

Although language has been seen to play a major role in the development of the industry, the assessment of the call does not necessarily seem to include an assessment of the key language components that are essential for successful customer service satisfaction. The scorecard is the pivotal assessment tool used for multiple purposes within the call centre industry. As suggested by Douglas (2000:1) assessment should be 'based on a theoretical construct of contextualized communicative language ability'. To date research on language and assessment has tended to focus on educational assessment (see Bachman 2000; Hamp-lyons and Condon 2002; McNamara and Roever 2006, etc), or assessment and policy, for example in the work of Shohamy (2006) and MacNamara and Roever (2006) who discuss government policy of immigration in relation to language assessment. Assessment within the workplace tends to focus on the correlation between standard language proficiency exams, such as TOEFL, IELTS, TOEIC and the role of attainment levels in these exams (Taylor, 2003). In addition a limited number of studies have assessed rater's behaviour in proficiency assessments (Brown 1995; Lumley 1998). In countries such as the Philippines the expense of such standardized exams is prohibitive, despite the fact that the results of such language assessment may not be what the industry is looking for. Thus with limited knowledge in the assessment of the language that is actually taking place QA techniques within the business field, and specifically within the call centre industry, tend to, as we argue in this paper, be ill informed and incorporate little understanding of the communicative demands on the CSR within the

interaction.

In our discussion of the scorecard as an assessment tool we apply insights from language assessment and also understanding language as a meaning making system which is socially constructed. In recent years studies in assessment have developed in ways that have made language assessment a more objective process and a more communicative process. Common language assessment practices try to make the process more objective through the design of scales and descriptors against which a number of assessors can objectively mark and calibrate. The absence of such tools opens up the process to personal judgments and results in the assessment of a candidate's speaking or writing ability being very subjective.

In the call centres industry in the Philippines at present, recruiters in Human Resource (HR) Management have great difficulty in developing language assessment tools. HR personnel have reported in our discussions that many language assessment practices that have little correlation with the work expected of the candidate (Forey and Lockwood 2007). Some recruiters administer grammar tests, which may give information about what a candidate knows about language but does not provide information on whether it can be effectively used. Others judge how American the accent sounds. As outlined by Bachman (1990) good language assessment practice dictates three fundamental principles:

1. **Validity:** Does the assessment test what is relevant to the candidate in the target communication situation? Does it reflect the communicative needs of the target situation?

2. **Reliability**- Does the test result remain the same across time and raters? In other words, if John were to administer the assessment today on a candidate, would Mary have the same results on that same candidate tomorrow?
3. **Practicality**- Is the assessment easy to administer and mark?

Language assessments that do not meet these fundamental principles are invalid, unreliable and fail to address their purpose. As established above the scorecard, as part of the larger QA process, is a 'high stakes' assessment, and as an assessment tool in the NNES context and it needs to meet the following criteria:

1. That the scorecard is a **complete set** of all communicative functions and stages present in call centres transactions, i.e. it has **validity**.
2. The scorecard reflects the competencies described above that constitute communicative competencies, i.e. it has **validity**
3. That the scorecard is a balanced reflection of the relative value (or weighting) that a scorer may give to different components and criteria of the call, i.e. it has **validity**.
4. That the scorecard provides, in a washback sense (see Alderson and Banerjee 2002; Bachman 2000; and Weir 2005 for a discussion of washback), prescriptions of what a good quality call really is, i.e. it has **validity**
5. That the scorecard can be completed in an easy and practical way, i.e. it is **practical**
6. That the scorecard is an objective rather than a subjective measure where each scorer arrives at the same result, i.e. it is **reliable**

It is important to evaluate some of these assumptions in relation to an authentic sample of a scorecard. In this paper we discuss in details the 35 Golden Points scorecard. A typical call centres QA scorecard, example outlined below used by an

American company in the Philippines (35 Golden Points), is analysed in order to ascertain whether it effectively measures and diagnoses the language and communication output of NNES agents. It should be emphasized, at this point, that the QA scorecard typically does not only assess for language and communication, but also two other essential aspects of call centres transactions: (1) attitude and behaviour, and (2) product and systems knowledge. This paper does not evaluate the effectiveness of these two other aspects. We focus specifically on the language and communication scoring approach.

The Scorecard: The deconstruction of the QA scorecard

The 35 Golden Points Scorecard is used in this article, as one example of many QA scorecard approaches that have proven adequate for QA processes in a domestic call centre contexts, but which are proving to be problematic in a NNES offshore environment. The purpose of this section of the article is to deconstruct the scorecard from a NNES CSR perspective. The scorecard items are divided into 5 parts, as follows:

1. Make a connection: Create a professional image (7 items)
2. Act positively: Tell them you will help (6 items)
3. Get to the heart of the matter: Listen and ask questions (6 items)
4. Interpret the fact: Highlight what you will do (7 items)
5. Close with agreement (7 items)

Each part is made up of 6-7 items, each item is expressed as a competency statement to which the rater assigns the scale *1 – Exhibited; 0 - Not exhibited, or NA – Not applicable*. Each section in the scorecard is presented below in Tables 1-5. At the end of the assessment the number of ‘exhibited’ items are totalled up and the result of X

(no. or correct items)/35 is given to represent the assessment.

The 35 Golden Points scorecard partially reflects the call centre flow but does not account comprehensively for the language and communication issues that confront an NNES agent. We argue that the points weighting is poorly distributed given the fact that not all the stages in the call are equally important in creating a good quality call. As outlined by Forey and Lockwood (2007) the two stages of **purpose (3)** and **servicing (4)**, as illustrated in Figure 1, are the most important and complex stages in a call and it is in these stages where communication breakdown more frequently occurs. Thus the weighting of assessment should reflect the complexity of the call.

[insert Figure 1 about here]

[1] The opening (Make a connection: Create a professional image)

If we look at the ‘opening’ of a call, an obligatory stage, there was very little risk in general of communication breakdown. At this early stage of the transaction where problems and relationships have not yet emerged, the only important issue is to sound friendly and professional. This is not difficult for the NNES agent and can be learned. As suggested by Hood and Forey (2005) the initial part of the spoken interaction is crucial in establishing the relationship between the interlocutors.

Table 1. The Scorecard: Part 1 Greeting

#	Components	Criteria for Scoring
1	Greeting – offer welcoming words	No “Hi”, “Hello”, “can” “speaking”
2	Greeting – maintain upbeat tone	Does not drop in tone at end, ends in an upbeat (form of a question)
3	Greeting – use unhurried pace	

4	Really listen – don't interrupt	Let caller vent
5	Express empathy through words	Can have without #6
6	Express empathy through tone	Can't have without #5
7	Use caller's name as soon as you hear it	First opportunity to use name – ask for it if not given

As shown in Table 1, item 1, one of the opening statements suggested below would be seen as effective (1) whilst the other would not (2):

(1) *Customer services, this is Carlos, how may I help you?*

(2) *Hi Customer services, Carlos speaking how can I help you?*

Example 2 would not be given a score as it includes *hi* and *can* which have been identified as inappropriate. This is problematic. They both fulfil the function of opening the call effectively. To close down options for the NNES agent is counterproductive in encouraging the agents to be responsive and spontaneous in their functional communication with the customer. Such prescriptive restraints are flawed and also likely to be misunderstood by the NNES CSR who would then believe such language choices are simply wrong.

Items 5 and 6 *express empathy through words* and *tone*, both relate to either the optional purpose moves before gathering information and/or the mandatory purpose move after the gathering of information. In some cases, the purpose of the call will entail an empathetic response which will be a combination of grammar, vocabulary and voice quality; meaning is made by a combination of these elements. Item 5 is problematic insofar as phonological and words together achieve the meaning desired. You cannot have one rather than the other if you want to be a successful communicator. To deliver an empathetic response in a monotone and or with falling

intonation would be understood by the native English speaker as being insincere or at best, behaving like a robot. This is a common complaint made by customers of Filipino call centres agents. To a NES, these items may communicate the need to use words, but to a NNES this may be perplexing and misleading.

Item 7 as in items 18 and 28, asks the agent to use the customer’s name.

In the right context, this may be appropriate (usually where the call is going smoothly) but there are many contexts (particularly where the call is not going smoothly) in which using the customers name can be inflammatory and exacerbate good interaction. Using the customer’s name may be misunderstood by the NNES as a way of not using other important areas of functional interaction language such as reassuring the customers, asking if they require further information, probing and so forth. Using the customer’s name is not a panacea for good interaction. It is rewarded 3 times, later in item 18 ‘*After hold – use name, pause and say thank you*’ and in item 28 on the 35 Golden Points Scorecard. Thus, if the CSR uses the customer’s name at the 3 specific stages then it might be assumed that the CSR is successful, which may or may not be the case. Simply using someone’s name is not a panacea for good interaction.

[2] Gathering information (Act positively: tell them you will help)

In this second stage of the call centres transaction, assuming the caller is not angry, the interaction is routine Therefore, like the opening this part should not be weighted too heavily unless there is a complication.

Table 2. Gathering information (Act positively: tell them you will help)

#	Components	Criteria for Scoring
8	Tell caller you will help	Must have “I” “you” and a verb – must be clear statement

9	Ask permission to gain more information	Must be clear question (when 3 or more questions are to be asked)
10	Use "I" not we when appropriate	"We" used in reference to next steps, ownership
11	Be courteous, use please and thank you	Be polite and friendly
12	Express sincere, helpful attitude with tone	86% - majority of the call
13	Remain calm	Not defensive in words or tone

The important functional language that emerged from the linguistic analysis (Forey and Lockwood 2007) was the ability to probe for full information if required. Item 9 appears to be a valid one, although the criteria statement is mystifying. *Must be clear question (when 3 or more questions are to be asked)* Are we to assume that the first two can be unclear?

However the other items are either behavioural items (e.g. 'remain calm', or items that may or may not be applicable to the interaction. How one measures Item 12: *express sincere, helpful attitude with tome (86%- majority of the call)* is very unclear.

Vague language is unhelpful to the NNES agent. For example, in items 10, 22, and 24 the words *appropriate* and *proper* without further definition are, in the end, nothing but subjective judgments. Again this is not so critical if dealing with a NES agent.

[3] The purpose of the call (Act positively: tell them you will help/ Get to the heart of the matter: Listen and ask questions)

There are constant complaints from US raters regarding their call centres in the Philippines that NNES CSRs do not listen effectively. Understanding the problem the customer has lies at the very heart of effective servicing. Here the score weighting should be high. However, as shown in Appendix 2 the scoring system remains

constant throughout the scorecard.

In the 35 Golden Points scorecard, item 14 is extremely important: *ask question to find the catch point: Issue/purpose of the call*. This requires very good interactive, discourse and language skills as well as an ability to predict and synthesize information quickly in English as it is given. However, the other components in this category could be labelled as routine: e.g. item 15 *repeat numbers* and items 17 and 18: *Before hold or transfer – explain and ask permission; after hold- use name, pause and say thank you*. Item 16 is unclear and item 19, is like item 14, fundamental to the language and communication work of an agent. Item 19 states *work with, not against the customer*; what does this actually mean to the CSR is unclear. When a customer is shouting at you and expressing frustration how should the CSR ‘work with this’? This item needs to be a clear and accurate descriptor which would be explicit to both the CSR and coach.

[4] The servicing (Act positively: tell them you will help/Get to the heart of the matter: Listen and ask questions/ Interpret the facts: Highlight what you will do)

This stage, together with the purpose, is another critical phase in the call centre transaction. In the Philippines, the NNES CSR has difficulty in this phase of the call centre transaction because of the requirement to explain clearly (**discourse** capability) and the ability to **interact**. This is the part of the transaction that is most likely to go wrong. For this reason there should be more weighting given to how the NNES agent manages this part of the call. The 35 Golden Points scorecard only assesses the product component of the explanation in item 21 *be knowledgeable and accurate*.

Crucially, the two common language and communication problems described above namely an ability to interact and explain extensively (discourse capability), that NNES CSRs experience at this stage of the call are not listed in the scorecard. The result of this is that they are currently not being measured nor are these crucial elements diagnosed as problems for training and coaching.

Other items in this section, such as: *keep the call to appropriate length* and *maintain appropriate pace* are general statements of desired behavioural procedures that will vary depending on context. In addition the length of the call may vary depending on the complexity of the call. Information of the call length is produced through detailed statistical descriptors, and is perhaps one of the key considerations when looking at the statistics of the average handling time for a particular contract.

Generally in Part 4 of the 35 Golden Points scorecard form, the items for scoring are ambiguous and incomplete. Item 20: *give security- use specific phrases* is unhelpful, implicit and imprecise in a NNES context.

There is no attempt in Part 4 to assess and diagnose the functional language used within those moves, e.g. empathy, apology, sympathy, positive assertion, explanation and description, probing, asking for information, reassuring, and transitioning.

Agents are given a score based on whether they summarize the next step, but not what has just come before.

[5] The closing (Closing with agreement)

The final part of the call centre transaction, like the opening phase, is mostly formulaic and takes place when the issues have been resolved. Again the weighting in this part of the scorecard should be minimal. It is therefore interesting to note that

there are as many items in this section as in the servicing section and more than in the purpose section. If the score of the opening and closing sections were totalled up they would be more than the purpose and servicing. This kind of weighting will not give accurate and valid QA scores for NNES agents.

The closing components are similarly bedevilled with ambiguity. Item 29: *end with a formula phrase*; impracticality: Item 31 *let the caller hang up first*; prescription Item 28 *use the customer's name*, and very general competency statements: Item 32 *did you control the call professionally?*

Discussion

The problems with the set of communicative functions included in the scorecard are threefold. Firstly, the items are expressed as either very general all-encompassing statements or else as small, minor, discrete instructions. Secondly, the items are prescriptive; and thirdly, they are incomplete from a language and communication standpoint. All constitute major problems when dealing with NNES as these recipients need to exercise choices and judgments when using functional language. Additionally, and most importantly in the context of service level agreements, what is not included as a QA measure will be seen as unimportant. Some striking absences, for example, in 35 Golden Points scorecard, are the functions of apology, explaining clearly, and a demonstration of the ability to positively and professionally assert oneself to take control of the servicing within a call.

The incomplete approach in the 35 Golden Points scorecard towards defining and scoring functional language will adversely affect the way NNES are diagnosed for language and communications training. It neither fairly judges nor diagnoses the

problems facing NNES agents in an outsourced context. Something more comprehensive and grounded in an understanding of the linguistic stages of a service telephone interaction and functional and communicative language features of the call centre transaction will ensure more validity in the scorecard and therefore more useful analysis that can lead to improvement.

The 35 Golden Points scorecard- The deconstruction of the QA scorecard against communicative assessment principles.

This QA scorecard is based on US perceptions and experiences about what could and does go wrong in a NES call centre agent interaction. It focuses on behavioural and attitudinal issues of NES agents that are reflected in their communication. However, the important point is that it only addresses attitude and product knowledge, while ignoring both language skills and how insufficient language skills can present as behavioural and attitudinal problems. A completely different approach needs to be taken in a situation where CSR's are not operating in their mother tongue or dealing with customers from a different culture. NNES agents may also have attitudinal and product problems, but the components in the scorecard for NNES must also be based on an analysis of the English language communication and sociocultural issues that NNES agents experience.

Further issues related to language and communication assessment with specific reference to the 35 Golden Points scorecard are discussed below.

Relative values and weightings assigned in the scorecard

There are some features of the call centre transaction that are more critical than others in achieving customer satisfaction. For example, it is self evident that some areas of

the 35 Golden Points scorecard are more important than others in achieving success. For example item 21, *Be knowledgeable and accurate*, is more important in call centre servicing than item 31, *let caller hang up first*; and item 12, *express sincere, helpful attitude with tone* is more important in building trust than item 7, *use caller's name as soon as you hear it*. Indeed items 7, 18 and 28 all assign a value to using the caller's name. If the agent does not use the callers name his/her QA score will be affected significantly regardless of the level of success in the call. Clearly the 35 Points Scorecard, as well as not being complete set of components and criteria, also does not carry equal weighting as far as assessing the quality of a call. We suggest that it cannot be a reliable tool for assessing quality in a NNES environment.

Washback of the scorecard

The effect the QA process, in this case the scorecard, has a direct impact on the way the CSR learns how to take calls and modifies his/her behaviour on the phone. This is a phenomenon called 'washback' (Alderson and Banerjee 2002; Bachman 2000; and Weir 2005). What is tested will be taught and learned. If the scoring and QA processes are based on solid research and are valid, the washback will be positive, i.e. the right judgements will be made and the diagnosis of what is going wrong will be comprehensive. The communications coaching that then ensues will be well-targetted. If, on the other hand, the scoring and QA processes are inconsistent, incomplete and poorly weighted, the scoring will be inaccurate and the diagnosis problematic, thereby rendering the coaching a waste of time.

The 35 Golden Points scorecard provides negative washback into judgements and diagnoses for NNES CSRs because, from a language and communication point of

view, it attempts to be prescriptive and not contextual. This matters less for NES CSRs who are assumed to have good communication skills.

The practicality of using the scorecard as a language and communication assessment tool

When scoring for language and communication competency, it is important to allow the effectiveness of the whole spoken text make an overall impact first. Good language and communication assessment practices have defined the salient features of communicative competence in 3 or 4 major categories such as pronunciation; interactive ability; discourse coherence and language range and choice. Language assessors know what the components are of each of these, but they are not listed as discrete points to score as they will not all occur in samples of spoken English. A discrete item ticking exercise of this complex exchange does not constitute good language assessment practice. This is because language effectiveness cannot be scored on the sum of a number of discrete parts that in themselves do not constitute a communicative exchange. Instead, good communication assessment practice first defines the fundamental criteria and then scores around a scale linked to descriptors of what is heard (Douglas 2000). It would be unusual when developing a language and communication assessment to be able to say that a single partial transaction is either a yes or a no. As mentioned previously, language assessments are made along a scale of proficiency scores and linked to objectives criteria. Both qualitative comments and quantitative scores are yielded from these results.

A concern with the 35 Golden Points scorecard and many like it, is that it requires a yes or no response. There are no scales and no descriptors to score against. This

makes scoring subjective and a poor reflection of the interaction.

In summary, the components are random, the criteria are idiosyncratic and the points marking system is inconsistent with best practice in language and communication assessment. For NNES agents it will yield poor analysis of what is going wrong in the call centre transaction from a language and communication point of view.

The validity and reliability of the process of scorecard assessment

In any scoring of language, it is important to minimize the problem of making very subjective judgments. In order to guard against this and increase the validity and reliability, the language assessment should be based on comprehensive criteria and a scale that plots proficiency and competency ability and detailed descriptions of each of the criteria for each step on the scale. This enables the assessor to be guided in a more objective manner when making the assessment. It also minimizes ambiguity in the interpretation of the criteria.

As already mentioned, the 35 Golden Points scorecard is incomplete in terms of its analysis of the call centre transaction. It does not have a scale and it does not have detailed and clear criteria. Its poorly constructed descriptions of language and communication render the whole assessment invalid and unreliable. For the NNES this is a serious problem as improvement in language and communication must rely, in the first instance, on a valid and reliable tool to make language judgments and diagnoses.

Together with ambiguity, lack of definition is also a problem in the scorecard. For example, vague statements like item 25 *maintain appropriate pace*; item 24 *speak*

clearly with proper volume; item 22 keep call to appropriate length are all open to interpretation. Such words as ‘proper’ and ‘appropriate’ need rigorous definition if they are meaningful in language and communication scoring.

Suggested Model: Based on communicative competence

‘Communicative competence’ (Canale and Swain 1980, Canale 1983, Savignon 1983) comprises a number of elements which will be individually discussed below. These components provide a rich interpretation of what is present in good communication and goes far beyond the hitherto limiting view that good grammar is all that is required. Canale (1983) writes of the nature of linguistic communication as:

- (a) being a form of social interaction and therefore normally acquired and used in social interaction
- (b) involving a high degree of unpredictability and creativity in form and message
- (c) taking place in discourse and sociocultural contexts which provide constraints on appropriate language use and also cues as to correct interpretations of utterances
- (d) being carried out under limiting psychological and other conditions such as memory constraints, fatigue and other distractions;
- (e) always having a purpose (for example to establish social relationships, to persuade or to promise);
- (f) involves authentic, as opposed to textbook-contrived language, and
- (g) as being judged as successful or not on the basis of actual outcomes

(Canale 1983:3-4)

This rich interpretation is discussed in relation to the QA scoring processes and needs in the outsourced call centre context and the specific needs of NNES CSRs. In successful spoken communication or in successful ‘communicative competence’

therefore, the following features need to be evident.

Language competence (an ability to use grammar, vocabulary and the phonological features of the language)

Discourse competence (an ability to recognize the flow of a spoken or written text and construct them)

Sociolinguistic competence (an ability to understand the intercultural nuances of the language)

Interactive competence (an ability to make appropriate functional exchanges in the language)

Strategic competence (an ability to repair language, particularly spoken language when communication breaks down)

Specifically in the call centre context, these competencies will mean the CSR has the ability to:

1. interact well and build relationships with customers- includes listening and understanding the main purpose of the call as well as excellent speaking skills in English
2. make appropriate language choices, for example, recognising the difference between 'hold on' and 'if you just give me a minute there, I'll be able to pull up all your details...would you mind holding while I do this?'
3. construct text in a way that is understandable to US customers, for example an ability to display linearity versus circularity in the organization of text. This is a common problem facing Asian speakers of English. This textual construction

also relies on being able to paraphrase what has been said to achieve a clearer message and not hiding behind technical language and company jargon.

4. talk with phonological features that are easily understood by the customer , for example, using intonation and word stress that carries appropriate meaning and talking with accents that are globally comprehensible
5. maintain control of the call by positively asserting where the call may become rambling or angry
6. understand the nuances in the what the caller says to gauge how the caller is feeling and how best to service this caller.

Native English speakers generally have these language and communication skills, but for NNES speakers these communicative competencies will need to be identified, explained and trained. An assessment tool using the above domains has been developed and an example of this assessment tool is found in Appendix 3. The aim of this assessment tool is to understand the complete text and to assess it in a clear, objective manner which is explicit to the assessor and the CSR. In an attempt to provide BPO workplaces with an improved English language assessment instrument, the Business Processing Language Assessment Scales (BUPLAS) for the productive skills of speaking and writing were developed using current sociolinguistic frameworks to inform the domains to be assessed. ‘Best practice’ to ensure reliability, validity and practicality are embedded in the BUPLAS test construction and implementation. Whilst the theoretical frameworks are not new in English language assessment, there is a specific focus on the ‘interactional’ domain and an attempt is made to map ‘intercultural’ and soft skills business needs into this specific domain. However, by far the most innovative aspect of BUPLAS is the recognition that

businesses, and this case BPO businesses, require an –end- to-end solution in their assessment requirements that are consistently calibrated across recruitment processes, pre and post course training assessment and QA processes. However, our intention in this paper is not to assess the creditibility of BUPLAS, but rather to present an alternative to what we suggest is an inappropriate tool. BUPLAS will be discussed in detail in later papers.

Summary

There are important issues for English servicing call centres to consider when they outsource their operations to NNES destinations such as the Philippines, India and China. This article has focused particularly on the difficulties US companies are having in the use of their QA systems designed for a NES agency in the US and has used the 35 Golden Points scorecard as one example. In the Philippines, this kind of scorecard is not working because there is no proper account for the fundamental English language and communication problems being experienced by the NNES CSR force.

The generic model (Forey and Lockwood 2007) as outlined above illustrates the need to take a holistic approach to the overall impact of language and the role it plays in the construction of an effective call centre service encounter. Much can be learned from an interdisciplinary approach where the current QA business practices (that probe knowledge and behavioural skills in a NES call centre environment) can draw on language and communication practices in assessment. In doing so, the companies will be adapting themselves for better success in the outsourced NNES call centre destinations. There is a need within the industry to invest money in research and

underpin this explosive increase in offshore outsourcing call centres with rigorous and well informed studies which can assist the development of the industry. In addition, it should also be pointed out that as established above only 10% of all offshore work has actually been offshored. The trend in the future will be offshore and outsource more demanding work and to move the BPO service up the 'value chain' away from the mundane and more general jobs to professional and qualified support, e.g. a call centre is seen to be quite low on the 'value chain compared to a IT support (Vashista 2006). With this increase in the demands on the labour pool comes the threat in the form of a 'talent crisis' (NASSCOM 2007), where countries such as India and Philippines are forced to 'take remedial action' to invest heavily in the training and development of the young. However, this development and reinforcement within the workforce will be limited unless more research and a greater understanding of the language requirements needed within the industry are undertaken.

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Appendix 1

Call Centres Specialist		Date	
Customer Name / Policy		Evaluator	

The 35 Golden Points

Rating: 1 – Exhibited; 0 – Not exhibited; NA – Not applicable

Making Contact: Create a professional image

#	Components	Criteria for Scoring
1	Greeting – offer welcoming words	No “Hi”, “Hello”, “can”, “speaking”
2	Greeting – maintain upbeat tone	Does not drop in tone at end, ends in an upbeat (form of a question)
3	Greeting – use unhurried pace	
4	Really listen – don’t interrupt	Let caller vent
5	Express empathy through words	Can have without #6
6	Express empathy through tone	Can’t have without #5
7	Use caller’s name as soon as you hear it	First opportunity to use name – ask for it if not given

Act Proactively : Tell them you are there to help

#	Components	Criteria for Scoring
8	Tell caller you will help	Must have “I” “you” and a verb – must be clear statement
9	Ask permission to gain more information	Must be clear question (when 3 or more questions are to be asked)
10	Use “I” not we when appropriate	“We” used in reference to next steps, ownership
11	Be courteous, use please and thank you	Be polite and friendly
12	Express sincere, helpful attitude with tone	86% - majority of the call
13	Remain calm	Not defensive in words or tone

Get to the Heart of the Matter: Listen and probe

#	Components	Criteria for Scoring
14	Ask questions to find the main point	Issue / purpose of the call
15	Repeat numbers	
16	Avoid jargons and dramatic phrases	Don’t distance yourself from caller
17	Before hold or transfer – explain and ask permission	Hold might also be break in conversation
18	After hold – use name, pause and say thank you	
19	Work with, not against the customer	Proactively initiate solutions – do more than just what you are you supposed to do

Interpret the Facts: Highlight what you will do

#	Components	Criteria for Scoring
20	Give security – use golden phrases	Personal, specific, empathic
21	Be knowledgeable and accurate	Technical / process oriented. Tell correct information to caller.
22	Keep call to appropriate length	Concerns that go acknowledged – too much or too little information
23	Be proactive – set a deadline	Don’t wait for caller to ask when something will happen
24	Speak clearly with proper volume	
25	Maintain appropriate pace	Don’t speak too quickly or too slowly; interruptions
26	Summarize the next step	Doesn’t have to be everything, just what is next

Close With Agreement

#	Components	Criteria for Scoring
27	Get agreement on next steps	Ask for agreement – do not get by default. “Is there anything else?”
28	Use customer’s name	
29	End with a golden phrase	Give security in closing
30	Use sincere tone	Trailing off, dropping, flat, sarcastic, defensive

	31	Let caller hang up first	
	32	Did you control the call professionally?	Must get 8, 9 and if so, will get 32
	33		Is the customer closer to a solution as result of your interaction?
	34		Was the call within the AHT?
	35		Was the customer completely satisfied with your servicing?

TOTAL SCORE
