Sample Task Analysis

	Actions Required	Information Source
Needs Analysis Issue	Create a training and materials for new hires to include: the purpose of the call center agent, the role, how to utilize the technology platform, and how to excel at the job.	Client
The Business Need	*We want to hire new call center agents and make them productive as fast as possible while providing them with the resources to get answers and find solutions on their own. Our employee turn-over rate is higher than normal.*	Client Interviews
Tasks in Expert Performance	**Technical Platform-** **Task 1- Log in** Enter credentials Check box- I am not a robot You will hear a voice saying "soft phone connected" If you do not hear that- check for issues with connectivity, headset When a call is presented- you will see the following screen: NEW CALL- Connected to: **Task 2- Call - Candidate Interested** This screen populates –where they will select a "queue" – or campaign type (crisis response or open house) (Customer service background would be used to word que) Press control/click to select more than 1 Click ok	Interview SMEs Call Center Manager- Nicole (4-21) Observe current training session - zoom meeting with new call center staff (4-20) Review call guides (4-21) Interview 3 recent new hires (4-23) Review sample calls (rec 4-23) Task Analysis - Spitfire (4-24)

	Refer to details of campaign on left hand side of screen **Campaign name - COVID19** **List Name - Healthcare Facility Name** **Caller information populates and the fields on the screen** **You will hear a beep** **Proceed with the call strategy- introduction** **If the caller is interested (in the job/campaign? What to call this?)** **NEW SYSTEM – CLICK ON URL IMMEDIATELY** **Click on URL** **This "Personal URL" screen opens (also called TRLURL)** **Personal information populates** **Complete the following required fields:** **Email** **Mobile phone** **License type** **Years of experience** **Current setting** **Current practice area** **Job search status *Most important** **Job type** **Highest level of education** **Managerial experience** **Preferred method** **Best time to reach** **Agent notes:** **Anything pertinent to recruiter at facility** ***client facing field** **Ask if the caller has any friends or colleagues interested in the position/HC facility** **Referral name**	

	Referral phone **Referral email**	
Tasks in Expert Performance	**Task 6 – Utilize call strategy**	Interviews with SME, new employees, expert employees
Tasks in Expert Performance	**Task 7 – Best practices - active listening skills & effective communication**	Interviews with SME, new employees, expert employees