Best Practice - Hiring Video Tellers

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NCR

Hiring Video Teller Resources

This document offers considerations and guidelines for identifying and selecting resources to support the services delivery model using the NCR Interactive Teller.

Candidate Selection

When hiring video tellers some individuals think "...*Tellers generally transition better than call center reps...*", while others think "...*Few traditional tellers will transition with success*..." It really depends on the skill of the person. To start, most financial institutions look within to find candidates. This is helpful since those resources will already have knowledge of internal systems and existing teller activities. It is advisable that the Remote teller group is OVERSTAFFED at the beginning due to the learnings for everyone, tellers as well as customers, with the understanding that transactions may take a little longer. At lease a 1:1 Teller/Unit ratio with break coverage

A strong customer service background, good communication and self-managers are positive skillsets and normally a good fit. Identify qualified customer service candidates who are proven self-starters and self-managers. Remember there is no cash handling required so that is no longer a requirement or an internal risk.

Select individuals who...

- Have a strong customer service background
- Enjoy people and are outgoing and friendly
- Enjoy, and are comfortable with, new technology
- Are comfortable "on stage" for long hours

1.1 Building Job Requisitions

Social media is a powerful tool in promoting employment opportunities. Financial institutions use social media to promote job opportunities. Individuals comfortable with technology will more than likely engage in social media.

Go out on sites like *Careerbuilder.com* and *Indeed.com*, also the financial institutions own career page, to find actual job requisitions for financial institutions that have implemented NCR Interactive Teller. There are many to view to help you write your own based on your financial institution's requirements. *Key words: video teller, virtual teller, remote teller, teller*

1.2 Considering Internal Employees

There are many benefits of identifying internal candidates to transition to video tellers. Existing tellers are helpful since they have been trained and are familiar with the internal teller system and call center reps have customer service skills and other transferable internal knowledge. There have been different financial institutions that have recruited video tellers externally as part-time resources and they eventually move into full time roles. In a few instances the video teller center is resourced entirely by external individuals. It is up to the financial institution as to how the center should be resourced.

Call/Contact Center Representatives. Call center representatives can make good video teller candidates. Hiring managers should not make the assumption that call center representatives would naturally fit the video teller function because it's in a "call center like" environment. Unlike the traditional call center, this is service via video so the "comforts" of serving consumers by *phone only* disappear. Such comforts are having relaxed body language, varying facial expressions and a very casual appearance. There are benefits of identifying these individuals as they have the internal experience with customer service and are proficient on the internal systems.

Traditional Branch Tellers. Traditional tellers will transition well, as long as they have the customer service foundation and they are comfortable on camera. Benefits of transitioning existing tellers is the knowledge of the teller system and experience in the consumer facing environment.

1.3 Interviewing

Consider using different interviewing techniques when interviewing prospective video tellers. Also use and integrate video and teleconferencing into the interview process when possible.

Ask the obvious questions...

- Is this person outgoing and friendly?
- Is this person comfortable with technology?
- Is this person a quick learner?
- Is this person excited about technology?

Try different, innovative interview techniques

- Interview video tellers differently using video as the medium (like *Skype* & *Facetime*) to see how the candidate performs over video
- Add role playing scenarios to the interview process
- Look for corresponding facial expressions. Smiles and eye contact are important when using video to serve consumers

Forming the Team

2.1 Considerations for team structure

When forming the video teller team, it is helpful to start with a similar organizational model to that of the traditional teller line.

- ✓ Head Teller = Supervisor/Manager
- ✓ Back Up Head Teller = Supervisor/Team Lead
- ✓ Full Time positions (as primary)
- ✓ Part Time and Flex positions (to fill in for total number of operating hours)

Supervisor/team lead can be the resource who has managerial duties in addition to having the ability to assist customers/members at peak times or act as an escalation when there is an issue.

Manager may be a different resource and perform high level managerial functions (i.e. reporting/report analysis and interact with leadership).

- Complement full-time positions with individuals specifically looking for flexible hours
- Individuals with specific work hour requests to fit around their schedule
  - o Students are flexible, they value a flexible employer. Consider internships, course credit or work study by working with the educational institution to pre-qualify possible candidates
  - o Individuals working opposite hours of another in the household or around domestic schedules
  - o Split shifts offer coverage for peak times and weekends

Things to consider as the decision is made regarding pay rates, most financial institutions make the video teller role a *higher-level* position with a higher pay rate than that of traditional tellers and standard call center reps.

  - o Consider the video teller position as promotion from a traditional teller position with a higher starting pay
  - o Offer shift differentials for weekends and extended hours (if applicable)