How can we help?

>> GOOD PRACTICE
>> IN CALL-CENTRE
>> EMPLOYMENT

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Forewords

From Peter Johnston, Head, New Methods of Work, Directorate General Information Society, European Commission

Knowledge work, using computers and electronic communication networks, will be the future of working life for most people in Europe. We must all adapt to new ways of organising businesses and work, and new working environments. However, in realising Europe's strategic goal of becoming the most competitive and dynamic knowledge-based economy by 2010, we must ensure that there are accessible and attractive work opportunities for everyone.

The development of call centres has done much to improve business competitiveness and to offer new employment opportunities in many areas of previously high unemployment, and to people who need new types of work. However, working conditions, the quality of work, and career development have all taken time to mature.

This book, and the research behind it, provides a valuable guide to improving the quality of work for the millions of Europeans involved in call centre and related activities.

In supporting this book, the European Commission has particularly appreciated the positive approach and collaboration of European Trade Unions, notably the ETUC. The results are a valuable complement to the ongoing improvements in Information Society Technologies and in workplace designs for all knowledge workers.

Peter Johnston
Brussels
August, 2002

From Willy Buschak, Confederal Secretary, European Trade Union Confederation

Call centres are a symbol of the modern service economy in which services are available all around the clock and can be delivered from almost any spot. Call centre work is the fastest developing form of e-Work. The agreement signed by the European Social Partners in June 2002 on telework unfortunately does not touch much on call centre work. The task still remains to make call centre work more human and more closely corresponding to workers' needs. This means above all making employment in call centres stable; regulating collectively the main features of working time; designing workplaces ergonomically; and giving call centre workers as much influence as possible in the design of work organisation and tasks. This in turn implies: training, qualification, protection against control of behavioural patterns and participation rights for call centre workers.

The TOSCA project has gathered most valuable material, which will help us to understand much better the reality in call centres and the ongoing trends. The project also enables us to profit from many positive experiences that trade unions and forward-looking employers have already made together in their efforts to make call centre work more human. The ETUC would like to express its gratitude to all participants of the TOSCA project for their work.

Willy Buschak
Brussels
August, 2002

Executive summary

Call centres are a fast-growing area of employment in Europe. Two million Europeans work in call centres, and many more are likely to do so in the future.

This handbook draws on research into call centre employment carried out by the TOSCA[1] project in seven European countries funded by the European Commission's Information Society Technologies (IST) Programme.

The first project set up at a European level to carry out systematic research on call centre employment, TOSCA's work included an extensive review of the existing evidence, a survey of call centres in Belgium, Bulgaria, France, Germany, Ireland, Italy, Spain and the UK as well as in-depth case studies in each of these countries to gain a comprehensive overview of social conditions in call centres[2]. Led by the European Trade Union Confederation (the ETUC) TOSCA is also unique as the only trade union led project funded under the European Commission's Information Societies (IST) Programme.

This study looks at the social conditions in a wide range of different types of call centres in Europe across a broad spread of different sectors, and asks what is being done, and what else can be done, to promote good practice in call centre employment. It has been written for anyone with an interest in promoting good practice and making improvements in this area. It aims to provide practical guidance for consideration by policy makers, human resources managers, trade unionists, training providers, recruitment consultants, occupational safety and health practitioners and other

stakeholders committed to developing good practice in call centre employment in Europe.

>> Recruitment, training and staff development

The rapid growth of call centre services and the increasingly competitive call centre market in Europe means that issues of recruitment, retention, training and development are very high on the call centre management agenda. But repetitive work, stressful working conditions, relatively low pay and lack of opportunities for career development and pay progression can mean that the call centre workforce is often transient, with high annual turnover rates and consequently high recruitment and training costs for employers. Without effective strategies for combating these effects, larger call centres in particular can end up heavily reliant on casual staff and temporary or transient workers such as students, who may lack the necessary training for the job.

Training and career development are important for managers and team leaders as well as for call handlers. Call centre services are changing fast, and so is the technology they depend on. The pace and nature of these changes means that managers and team leaders need specific types of management training and skills, including change management, human resources, team building and managing systems development. This section of the guide looks at some of the initiatives taken jointly by employers, trade unions, recruitment professionals and training providers to tackle these problems.

>> Working hours

Working time arrangements are a critical issue for call centres. With many call centres operating into the night or round the clock, and/or operating across different time zones,

1 The acronym TOSCA stands for Table d'Observation Sociale des Centres D'Appels.

2 Reports of the TOSCA survey and the TOSCA case studies can be downloaded from the TOSCA website on http://www-it.fmi.uni-sofia.bg/TOSCA/

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the extensive use of shift systems and overtime arrangements can pose significant challenges for call centre staff and managers. Problems can include increased risks to workers' health and safety and difficulties in recruiting and retaining experienced staff, resulting in high staff turnover, low morale, increased costs, reduced productivity and poor quality services. The challenge is to manage working time in positive ways that operate in the interests of workers and employers alike.

The guide looks at legal issues, weekly working hours, breaks, shift systems, emergency cover and call out arrangements, overtime, flexible working, part-time work and related issues involving transport, security and welfare facilities.

Examples of good practice include participative arrangements for allocating shifts, and flexible arrangements for taking breaks, including screen breaks and breaks for recovery time or support following difficult, abusive or distressing calls.

>> Work organisation

Organisational structures and systems are central to service delivery and employment relations in call centres. The way that work is organised can affect every aspect of call centre work, including managerial relationships, performance management, staffing levels and job design, operational requirements, human resource management and industrial relations.

This guide covers
- managerial responsibilities and decision-making processes
- work organisation
- work distribution and job design
- team composition and team leadership
- staffing arrangements
- homeworking.

>> Performance monitoring

Performance monitoring is an almost universal feature of call centres. It takes various forms, but electronic performance monitoring is the aspect that prompts most complaints from call handlers. This study looks at some of the issues involved – unrealistic performance pressures and targets, excessive surveillance, restrictions on individual movements, communications and breaks, and lack of personal privacy.

Here, good employment practice includes ensuring that
- human needs are taken into account in the design of performance monitoring systems
- adequate training and support are provided for staff
- call centre workers are consulted about the design and operation of performance monitoring systems
- monitoring methods and assessment criteria are consistent, and are clear, transparent and bias-free
- team leaders are trained in how to provide positive feedback to staff with the aim of improving performance as an alternative to applying disciplinary sanctions.

>> Health and safety

Safeguarding the health safety and welfare of employees is an essential part of good employment practice. Call centre work involves significant risks to health and safety, and these are not always recognised or addressed. As a result, many call centres in Europe report high levels of sickness absence amongst their staff. The risks include
- stress-related ill health
- occupational voice loss
- acoustic shock
- visual fatigue
- musculo-skeletal disorders

- repetitive strain injuries
- violence and harassment
- postural problems affecting the health of expectant mothers and their unborn children.

The guide summarises the hazards of call centre work, and how the risks arising from them can be prevented or controlled. It also looks at the provision of welfare facilities in call centre environments and health and safety issues affecting home-based call handlers. It discusses the legal duties on call centre employers for health and safety and risk management, including risk assessment, prevention and control.

>> Equal opportunities and workplace culture

Fair and equal treatment is fundamental to good employment practice. The guide examines some important aspects of workplace culture and organisational ethos in call centre employment, including equal opportunities, work-life balance, dignity at work and wider discrimination issues. It looks at the requirements of European law and their implications for call centre employment. It highlights examples of good practice in developing a positive and productive workplace culture that protects dignity at work, promotes a positive work life balance and removes barriers to employment, training and development, enabling call centre employers to fully utilise the skills and potential of the whole workforce.

Demands for longer operating hours and flexible staffing arrangements can mean conflicting demands on workers that make it hard for them to combine call centre work and personal life. Employers and employees alike are benefiting from a more flexible approach that balances business needs and individual needs.

Practical measures to improve workplace culture and equal opportunities include flexible working hours, effective quality policies and procedures, maternity and parental leave, childcare provision, equal access to employment training and promotion, and positive provisions for disabled workers.

>> Pay

Fairness, equal pay and transparency are hallmarks of good employment practice. To achieve this, call centres need pay systems that provide a living wage and reward all employees fairly and consistently and at the appropriate rate for the job. The guide covers all the main elements of call centre pay systems, including pay arrangements for atypical workers and the legal requirements that affect pay in the European context.

>> Industrial relations issues

Freedom of association and freedom of expression are fundamental human rights, both at work and in personal life. Good employment practices recognise this and make arrangements for consultation and collective representation of staff.

The study examines some of the ways in which employers, their employees, employee representatives and other interested parties can work together at all levels to develop and promote good practice in call centre employment. It looks at the background to collective bargaining and union organisation in call centres, and at some of the innovatory initiatives and agreements reached. Despite obstacles to progress in this area, including the transient nature of the workforce, considerable progress has been made, particularly where there has been a past tradition of collective organisation and representation.

>> Conclusions

Progress in improving call centre employment conditions has been brought about by a combination of trade union activity and proactive approaches to employment by some progressive employers.

In some cases other policy stakeholders, such as government organisations, the European Commission, and NGOs have also played a part by funding research, training schemes or pilot projects, by organising conferences or workshops, by designing regional economic development strategies involving call centre employment and by a variety of other means. This has yielded benefits for employees and employers alike – and not only in the short-term.

In recent years there has been significant progress towards a better model of employment practice in call centres. More and more call centres are attempting to break away from their negative image and find radical and positive human-centred solutions.

There is little doubt that changes are needed. Failure to break the pattern of low pay, lack of flexibility, intensive workloads, unrealistic performance targets, constant monitoring, poor job design and unhealthy working conditions will perpetuate existing problems and will store up serious risks for the future.

A shift in corporate values in some call centres may help to ensure that short-term gains of increased productivity, meeting targets or securing contracts are not outweighed by longer term losses resulting from sickness absence, high turnover, low productivity or poor service delivery.

Trade unions have a major part to play in shaping the call centres and contact centres of the future, and making sure that future changes benefit the people who work in them. Working together across Europe, sharing information and examples of good practice, learning from the past, and bringing other call centres up to the standards of the best can all help to make these changes positive. Trade unions will need to proceed on several different fronts simultaneously to achieve these broad goals.

At the most basic level, they will need to continue to promote their traditional values and bargaining agendas already developed in other types of employment and transfer them to the new working environment of the call centre. This includes demands for such things as higher salary levels, more continuity and security in working agreements, combating stress, ensuring more worker control of work rhythms, improving workstation ergonomics, working hours and holidays and defending workers' privacy.

But these traditional roles are not enough in themselves. In order to tackle the special problems of call centre employment, trade unions will also need to supplement their traditional negotiating and collective representation role with more personalised and specialised individual services. They will also need to revise the relationships between federations to take account of inter-sectoral mobility, and develop means of co-operating more closely across sectoral and national boundaries, as well as becoming more responsive to the needs of women workers.

It must, however, be recognised that for many workers call centres may continue to be a transient form of employment, perhaps taken up as temporary work whilst studying or to fit in with some other life transition, such as a period spent looking after young children or caring for a sick parent. In such cases it is extremely important that measures are taken to ensure that during such periods call centre workers still have access to learning opportunities which will give them genuinely transferable skills that they can take with them to other sectors of the economy or use in their capacities as citizens of the information society.

1 What is a Call Centre?

Although telephones have been with us for well over century, and people have had jobs answering them for many years, the concept of a specialist 'call centre' or 'contact centre' is relatively recent.

Manually operated telephone exchanges, switchboards, emergency call-out services, mail order facilities and information centres are not new. In some cases they have also combined telephony with the use of computers and other display screen equipment. So what has changed?

Over the past few years, several trends have converged to bring this form of employment into widespread use. They include advances in the capacity, cheapness and sophistication of telecommunications technology; the growth of a more customer-focussed culture; and an increasingly tele-literate population. Not only are citizens increasingly comfortable using telephone or email communications; they also have a growing expectation of being able to access the information and services they need at the time when they require them. This has led to new forms of service delivery.

Taken together these trends have produced a situation where for a wide variety of organisations the front-line interface with the customer is now mediated by a telephone or a web site. The call centre, estimated to be the most rapidly-growing form of employment in Europe today, is now a feature of the organisational landscape in almost every sector.

From health services to holidays, from book-selling to banking, from timetable information to tax advice, from software support to psychotherapy, from interviewing to investment, the call centre is increasingly becoming the focal point of

contact between the providers of goods and services and their customers, be they other businesses or individual consumers. And call centre workers have become the organisational front line in each of these industries.

As they spread into new areas of activity, call centres become increasingly diverse, involving a wider range of skills and a greater variety of opening times, organisational forms and working practices. Some may involve highly trained and specialised professionals whereas others require only routine skills. Some may serve a global market whilst others are limited to a single local area. Some may require round-the-clock coverage whilst others may only operate for a few hours a week. Some may involve only voice calls whilst others may handle enquiries that arrive by email or in the post. Some may involve initiating calls to strangers, whilst others may handle only incoming calls. Behind this new customer interface lie new forms of work organisation.

The rapid growth of call centres has taken the statisticians by surprise. Although attempts are now being made to monitor these developments, call centres do not correspond with any of the traditional categories used to classify types of industry or occupation and as a result nobody really knows quite how many call centres there are, how many people are employed in them, or how fast they are growing.

Indeed, there is not even a generally agreed definition of a call centre. Should the designation be limited only to call centres that are on separate sites? Should it include centres where dealing with telephone or Internet enquiries is combined with other activities? Should it only refer to centres where there are more than a certain

minimum number of workers? Should it even refer to a specific location at all, given the existence of 'virtual call centres' where calls may be answered by homeworkers many miles away from the centre from which they are managed? And what about call centres which have evolved from traditional departments, such as government 'inquiry points' or emergency help-lines?

After considering a variety of alternatives, the TOSCA project decided that for the purposes of its research the most useful definition of a call centre was one which took as its basis the labour process of the workers involved. A call centre was therefore defined as

an office employing people in specialist posts involving the use of a computer and a telecommunications link to process communications in voice or electronic form.

This was further qualified as follows

These communications may be either with external parties (e.g. the general public, or customer or supplier businesses) or with other parties within the same organisation (e.g. a central enquiry point).

The communications may be initiated by the external partner or by the call centre worker (inward or outbound calls).

And they may take the form of voice, fax, email or some combination of these media.

The work involved may be high-skilled (e.g. a legal advice line, or telephone counselling) or low-skilled (e.g. giving standard information such as directory enquiries).

The workers may be paid by time or by results; permanent or temporary; full-time or part-time; employees, self-employed or agency workers.

The call centre may be a stand-alone separate centre, a department within a larger organisation, on premises shared with other functions or a network of smaller workplaces linked electronically.

What the workers have in common is a common labour process. There are of course many workers who combine some call centre type functions with other activities but for the purpose of the project it was decided to focus on those who do nothing else. Because it is rare to find such a specialist division of labour in very small organisations it was also decided to limit our study to centres where there were a minimum of ten workers who spend all their working lives as call centre operators according to the above definition.

Whilst it was recognised that this definition did not encompass the entire spectrum of possibilities of call centre working, it was felt that it made it possible to focus on those aspects of working conditions which are most characteristic of call centres and to identify the issues which are unique to this sector.

2 Call Centres in Europe – the general picture

There is as yet no official definition of a 'call centre' in the European statistics, so it is impossible to say precisely how many call centres there are in Europe and there are major differences in the estimates.

According to Datamonitor, there were in 2001 736,700 call centre agent positions in Europe based in 15,485 call centres, of which approximately one third were in the UK[3]. Europe-wide compound growth would be 12% over the next two years[4]. By the end of 2002, the number of call centres in the UK was expected to grow to 5,370[5]. France had 17% of agent positions in Western Europe with a projected growth rate of 26% in 1999[6]. By contrast, Mitial Research estimated that there would be almost 12,000 call centres in the UK and Ireland alone by 2002, of which 3,950 would have over 20 agent positions and 8,000 would be smaller[7]. Some of these variations are related to differing definitions.

>> Some general trends in call centre development

Despite some disputes about the precise numbers, there is general agreement about some of the major trends, although the picture varies between sectors and countries, depending on their background and history and on how the technological infrastructures have developed.

3 Invest UK, http://www.invest.uk.com/Uploads/ InfoSheets/Contact%20Centres.pdf, July, 2002

4 quoted in CCA Research Institute, http://www.cca.org.uk/resinfo.html, July 2002

5 quoted in CCA Research Institute, http://www.cca.org.uk/resinfo.html, July 2002

6 Datamonitor figures, quoted by France Telecom, http://www.callcentrenews.com/resources/stats_money.shtml, July, 2002

7 quoted in CCA Research Institute, http://www.cca.org.uk/resinfo.html, July 2002

Some of these trends include:

- direct face-to-face contact with customers, clients, service users (and even patients) is increasingly being replaced with remote contact via a call centre
- contact based on voice alone is increasingly being integrated with other forms of communication, especially Internet or email-based communication
- governments (local, regional and national) are increasingly looking at call centres as a means of delivering public services and providing access to public information
- call centre work is increasingly being relocated to separate workplaces or facilities, which may be adjacent to the head office of the organisation but may equally be in another region, another country or even another continent.
- call handling functions and services are increasingly being outsourced to service providers specialising in call centre services who may operate a range of services for different customers and clients under the same roof
- there is some evidence of a growth in the use of homeworkers as virtual call centre operators although this remains a minority practice
- employment and recruitment agencies and training providers are increasingly responding to the demand for call centre services by developing and marketing specific services to serve this sector
- more sophisticated routing of calls, and the spread of call centres into more highly skilled and professionalised areas of the economy is leading to an increase in the skill requirements for call centre operators

>> The main types of call centre in Europe

Despite these common trends, there are some distinctive differences between call centres, cutting across national and sectoral differences. The TOSCA project carried out in-depth case studies of call centres in eight European countries and concluded that, when viewed from the point of view of working conditions, they fell into five distinct categories.

In-house call centres

The first type is the call centre within a large public or private organisation, with a specialised mission, typically customer care. This model also includes call centres that operate on separate sites and in some cases amount to virtual call centres. Usually the workers have some opportunities for promotion within other parts of the company, although even here promotion prospects are in reality quite rare. Conditions of work in such centres are generally superior in comparison with other models and therefore there is usually a lower turnover of staff. Trade unions, too, are often present in these centres, usually for historical reasons. Nonetheless, trade unions still have problems in gaining direct access to the workforce; often contractual conditions for call centre workers are different from those applying to workers in other parts of these companies.

Large outsourced call centres

These are involved in a great variety of activities. They are often partly owned by large companies in the telecommunications, computer or banking sectors. Many originally came into being to meet the internal needs of parent companies but then diversified and opened up to the market. Working conditions vary a great deal depending on the type of work and the country in which the call centre is located. Maximum flexibility is the aim here, both in terms of skills and contracts, this type of call centre being most exposed to variations in the market. It is unusual for trade unions to have a presence here, despite their being some differences in this respect between the countries studied. The workforce in such centres is typically young, often with temporary contracts and with relatively high labour turnover.

Small outsourced call centres

These carry out work for private and public clients across a variety of sectors. Often they have no more than two or three customers at any given time. Here we find one or other of two quite different situations. On the one hand fairly specialised call centres, for example so-called 'creative' call centres. Here, working conditions and the type of work lead to quite high levels of satisfaction among the workforce. The management style is often paternalistic and informal and there is little obvious differentiation by status. There are also cases of workers who have been promoted into client companies. At the other extreme are workers in small call centres where low-profit activities are carried out. Here there is little investment in retention or improvement of working conditions and the workforce appears to be regarded as disposable. Albeit for different reasons, a trade union presence is rare in either type.

'Social' call centres

These exist both in the public and private sectors. They offer medical, social welfare and emergency services. Professional specialisations are usually involved, such as psychologists, social workers, lawyers, doctors and nurses. The workers are usually very motivated and they regard working in such call centres as a meaningful professional experience. Indeed there are many voluntary workers in such centres. The fact of not being exposed to market forces also has an impact on working conditions, even if in some cases productivity is low. Stress seems to be caused in centres like these more by the content of

the work than the basis on which skills are used. Although the pay may be low, motivation and work experience opportunities mean that staff turnover is relatively low too. Trade unions exist only in the public sphere, while in the private sector there is a prevalence of informal working relationships and strong identification by the workers with the business.

Highly automated call centres

Highly automated call centres are relatively few and far between. They are usually private and often linked with computer businesses. The majority of workers are professional, such as programmers and computer scientists. The number of operatives is generally small - usually some 80 percent of telephone calls are dealt with automatically. This situation means that existing staff carry a heavy workload and responsibility, and identify strongly with the employer's interests. Trade unions appear non-existent in this sector.

>> Employment conditions

With such variations it is dangerous to generalise too broadly about working conditions in call centres in Europe. At one extreme we find committed professionals with a strong identification with their jobs, permanent employment contracts and a long-term future with their employer; at the other are highly casualised 'electronic sweatshops' with pressurised working conditions and a rapid turnover of staff.

Nevertheless, some common features can be identified.

Location and work environment

The selection of call centre locations may be due to a range of different factors – including the cost of buildings or land, technological and transport infrastructures and availability of labour in the area. The balance of benefits against costs tend to favour urban areas, with

a large population to draw from, and many call centres are located in industrial zones or techno-parks on the edges of large towns. This raises serious questions about the ability of call centres to provide new employment in remote or rural areas. A typical large call centre will employ several hundred people in an open-plan office with shared workstations ('hotdesking'). But not all call centre functions are physically located in one place. As the capacity of the new information processing systems increases, we are also seeing the growth of virtual call centres. Virtual call centres can link call handlers through sophisticated telecommunications networks, either by linking call centres across different locations or by connecting individual home-based call handlers to a remote central system.

There are thus a range of different types of working environments, depending on the type of organisation and the service provided as well as on the specific arrangements agreed by each employer.

Work organisation

Call centre workers in larger call centres are typically divided into teams of ten to twenty call handlers with a team leader as first line manager. With virtual call centres comes the development of virtual teams where there is little or no direct physical contact between team members or between team leader and team members.

Automatic routing of calls and remote supervision have major implications for the way workflow is organised, the way that call volume is controlled, job design and contact, and the way that work is allocated between workers and workplaces. The way that work is organised also impacts on team work, management and supervision, and on contact between workers.

These changes thus have profound implications for how people work, who does

the work, the conditions they work in, and the effects that their working conditions and social conditions have on their lives and their health both at work and at home.

Stress
This intensification of work and demands, combined with lack of control over when and how calls should be taken and restricted opportunities to leave the workstation mean that the work can be highly pressurised as well as repetitive. Add to this the pressure of demands on call handlers – as individuals or teams – to meet stringent pre-set performance targets for call handling times and volume, and it is easy to see how some call centres have been characterised as 'modern-day sweat-shops'.

Increasingly the larger call centres are operating long hours or working round the clock, although this is not true in all cases. This in turn places additional strains on the workforce and raises important issues about work-life balance and workers' ability to reconcile their personal and work responsibilities.

Other sources of stress arise from restrictions on personal autonomy and privacy (e.g. restrictions on visits to the toilet) and from the surveillance and control methods used for performance monitoring.

To these pressures are added other problems: health problems arising from the monotony and repetitive nature of the tasks, the intense rhythms imposed and the self-control required for dealing with difficult or abusive calls. Features of the working environment also contribute to stress: for example the technical quality of audio-video equipment, workstation ergonomics, noise levels, ventilation and microclimate, producing musculo-skeletal and vision dysfunctions, as well as other symptoms.

In some call centres the level of sickness absence is worryingly high, with absence rates as high as 25%.

The result is high levels of stress in some call centres linked not just to heavy workloads but to the overall demands of the work, the design of jobs and workstations and the general working environment.

It must be emphasised, however, that stress is not a universal feature of all call centres. In some cases positive initiatives have been taken to reduce or eliminate these problems.

The workforce
Call centre workers are often young, sometimes students, but primarily women with intermediate levels of education. The most common level of educational attainment is the secondary school certificate. What links the labour force in every case is the fact of being able to respond to the need for flexibility, even if workers might have diverse social profiles. The evidence suggests that some gender stereotyping takes place, with employers preferring women to men, both because of their greater flexibility and because they are regarded as being better adapted to the kind of personal response required from operators. For men, call centre work tends to be temporary and related to entry into the labour market, while for women it is usually more permanent and often related to re-entry into the labour market.

Employment contracts and flexibility
The employment contracts offered to call centre workers reflect the national regulatory models of the country they are based in. Thus, in Great Britain the duration of the contract tends not to be fixed, while in Spain call centre workers tend to be on short-term contracts. In Italy a legal anomaly results in an intermediate contractual status for call centre workers, somewhere between freelance and employed status.

In some countries, companies structure work relations as concentric circles, with permanent staff constituting an inner group consisting mainly of managers and specialised operators,

these are supplemented by an intermediate group of staff on fixed-term contracts, in turn surrounded by a third, more fluctuating group on extremely short-term contracts. Status differentials are common, creating social problems and lowering the motivation of workers with inferior conditions.

Flexibility is an overriding principle in the world of the call centre. This involves both contractual flexibility and flexibility in respect of working hours. Workers are expected to do part time and shift work, often so that the centre can be staffed on a 24-hour basis. This flexibility is ambiguous in its effects. In some cases, flexibility may also suit the needs of workers, since many of them are students or have family responsibilities. For others, it brings unwanted precariousness and insecurity.

Staff turnover

For many young people call centre work is temporary and not an end in itself; witness the high turnover in this sector, often as high as 40% per annum. Nonetheless, it is worth considering that these workers have higher than average levels of schooling and consequently have expectations of professional improvement which are frequently not met. TOSCA's research shows that workers complain about poor opportunities for promotion and professional development. Call centre workers often migrate between call centres in their area in pursuit of more money or better working conditions or to escape from stressful working conditions.

The high turnover in call centres is double-edged both for employers and for employees. Turnover which is too high can damage businesses severely, both because of the effects on the quality of work caused by having an inexperienced and demotivated workforce and because of the high cost of recruitment and training replacements. However for some employers, especially in the outsourced sector, a significant degree of

turnover gives the business those margins of flexibility that it needs to deal with the unpredictability of the market and fluctuations in demand. Their aim may not be so much to achieve any drastic lowering of turnover as merely to reduce it for the sake of saving on training and recruitment costs.

On the other hand, there are also cases of call centres where the problem of retaining workers is beginning to be felt acutely. Businesses do need a core of stable workers and this is why some call centres have set up special schemes to recruit women re-entering the labour market, the long-term unemployed, pensioners or people with disabilities. and set up ad hoc programmes for them. Others have made the decision to replace temporary contracts with permanent ones. This demonstrates that though flexibility is a strategic element, an excessive turnover in the workforce can also be a brake on a company's development.

From the employee's perspective there are also paradoxes. Whilst there are always large numbers of workers who appear desperate to leave this sector, there are also simultaneously very many who are anxious to join it, reflected in the high number of job applications received by call centres. A possible explanation for this is that this kind of work is initially attractive in terms of its social status. Many young people are willing to work in call centres while regarding other jobs as beneath them, even though they might pay better. At least initially, poorer working conditions become acceptable because the work is only temporary and because a white-collar job is seen as easier or higher in status than manual work. In Ireland, comments at a TOSCA seminar indicated that many workers had chosen call centre work as a preferable alternative to work in the retail sector - sitting at a desk was seen as better than stacking shelves in a supermarket. However over time such attractions may wear off, or the workers become frustrated at the lack of career

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prospects, leading them to leave after a relatively short stay.

Fordist production-line or knowledge-based organisation?

But is the call centre the technological version of the Fordist production line or is it an example of knowledge-based organisation? TOSCA's analysis shows that call centres are not homogeneous and the majority of those studied can be placed in between these two models.

At one extreme there are call centres organised as production lines following a Taylorist model; at the other there are those in which the operators are relatively professionalised and levels of control are goal oriented, rather than process based.

Organisational models differ: some are individual and some are team based. However even in team organisation there is still a high degree of isolation rather than integration.

In general, while functions such as inquiries, booking, sales and telemarketing seem to require fairly simple tasks, in others, such as credit and insurance sectors, social health services, technical assistance and so-called creative centres, skill requirements are more complex.

Apart from the relative complexity of their tasks, call centre workers have little in common with blue-collar workers in manufacturing. Their social profile is very different from that of the traditional industrial worker. The issues for policy-makers should not be an abstract debate

about whether call centre workers do a job that is 'worse' than others, but how this kind of work can be sustained over a long period of time, and the fact that within the call centre environment the prospects for making any kind of professional progress seem so often to be blocked.

This lack of promotion prospects is relative. It is, for instance significantly better within in-house call centres than in outsourced ones. But even in in-house centres the call centre is not normally an entry point for other work within the company, contrary to the expectations of many of the young people who take jobs there.

>> Conclusions

There are multiple challenges facing employers and trade unions in this rapidly changing field.

Developing good practice in call centre employment involves addressing many aspects of call centre design and job content, and all the relevant factors affecting the working lives of those involved.

Drawing on the research of the TOSCA project, some of the most important aspects of call centre employment are discussed in the following sections of this handbook, with an emphasis on action that can be taken to develop good practice in tackling the key issues.

3 Recruitment, training and staff development

This section covers:
- **recruitment**
- **staff training and development**

>> Recruitment

Call centres use a variety of methods for recruiting staff, including:
- traditional forms of advertising in local newspapers and other conventional media
- using local job centres and unemployment centres as a recruitment point
- using specialist job centres or job clubs (e.g. for disabled workers) to contact particular groups
- outsourcing part or all of the recruitment and selection process to one or more recruitment agencies specialising in call centre recruitment
- outsourcing pre-employment selection and training to specialist selection and training providers, or working in partnership with them
- on-line advertising and on-line application forms on company websites and recruitment agencies' websites
- 'open days' on and off site
- 'assessment centres' where applicants undergo collective aptitude tests
- special recruitment and publicity arrangements with students' organisations and colleges
- specialist divisions of employment agencies dedicated to call centre management and staffing of call centres

As call centres develop, there is increasing demand for previous experience and relevant training and qualifications in call centre work and ICT skills, as well as in customer relations.

There is also increasing recognition of the different skills, aptitudes and approaches that may be required for different types of calls and different types of call centre work.

Some call centre employers are now becoming more particular about the way they select their workforce, investing more time and expert resources in pre-selection procedures and reviewing the selection criteria they use in recruitment processes. The reasons for these developments include the high turnover of call centre staff, the changing nature of call centre work, increasing competition for call centre staff, increasingly competitive markets for call centre services, and increasing market competition for goods and services.

Examples of good practice include:
- making sure that those responsible for recruitment and selection have clear and appropriate selection criteria, and operate using agreed procedures, whether the process is done in-house or outsourced to recruitment professionals or employment agencies
- where recruitment professionals or employment agencies are used, making sure that the selection criteria they apply are consistent with the call centre's own brief and selection criteria
- checking that recruitment and selection criteria are related to the requirements of the job and not to the personal characteristics (e.g. age, sex, race or disability) of individual applicants
- placing advertisements for jobs where all sections of the workforce and all community groups can easily access them
- making sure that equal opportunities policies and practices underpin recruitment and selection procedures, and taking active steps to avoid unfair or unlawful discrimination

3 **RECRUITMENT, TRAINING AND STAFF DEVELOPMENT** CONTINUED

■ encouraging disabled applicants to apply for jobs, consulting them about any special requirements they have to facilitate their interview or their work, and letting them know that where practicable, reasonable adjustments will be made to enable them to attend interviews and training centres and work in the call centre (or from home, if this is feasible)

■ providing job applicants with clear information about the terms and conditions that go with the job – including any requirements for probationary or training periods, and their duration

■ letting people know what to expect in call centre work – explaining to applicants the qualities, experience, skills and aptitudes that are needed for different types of call centre work

>> Training and development

Call centre managers and trainers – and some trade unions – agree that call centre work does not suit everyone, and that it requires specific aptitudes. Skills are needed not only for call centre work in general - the skill of communicating clearly without face-to-face contact - but also for specific aspects of that work. For instance different approaches and competences are needed to for inbound and outbound calls, for telephone, e-mail and web contact, for different types of sales and customer services and for particular kinds of professional advice. Each kind of work makes particular demands on call handlers and requires specific skill sets.

Training for managers
Managing call centres in a fast-changing technological and organisational environment, and with increasingly competitive markets means making sure that call centre managers are competent to deal with change management issues, including technological and cultural change. There is a need for specific competencies relating to call centre management, managing workload distribution, setting organisational targets and managing call centre information and computer systems. These competencies are specialist ones and may not be adequately covered in training courses for more general business management.

Call centre managers also need training in managing health and safety and ensuring that relevant legal requirements are met.

Training for team leaders and supervisors
Training for team leaders and supervisors is often neglected but the key role they play in managing people and performance makes this an important issue for call centres. Team building, team leadership, effective communications, coaching, performance management, equal opportunities and other first line management skills are all important here, alongside relevant call handling and customer services skills including dealing with difficult people or abusive calls.

EXAMPLE

In Belgium, the training agency CEFORA has developed a range of course modules for both call handlers and their supervisors. The basic management modules for team leaders (many of whom are former call handlers) cover management skills, team motivation, and preventing health hazards. Further modules have been developed on commercial techniques, scripting, ergonomics, group dynamics, leadership and performance management. It has been found that breaking up longer courses into a number of small modules provides greater choice and flexibility making it possible to mix and match to meet specific needs. It also prevents the decline in attendance associated with longer courses.

This call centre operator in a utilities company is being monitored by her manager for training purposes

Training for call handlers

Call centre work makes many demands on call handlers. Accurate, up-to-date information is needed as well as sound judgement and interpersonal skills. Errors can be costly, or even life-threatening if emergency services are involved, and inaccurate or out of date information about products, services or transactions and records can greatly increase customer or user dissatisfaction.

With more and more services, including essential public services, now being handled by call centres, the range of information being sought through call centres and the level of knowledge and competencies required by call handlers is increasing. Operators might need training to achieve:

- Technical understanding of call centre computer and telecommunications systems
- knowledge about the organisation's services or products
- knowledge about the organisation's databases, recording or billing systems and internal procedures.
- Understanding of the legal issues and ethics involved in providing certain types of advice and information
- procedures involved in re-routing calls, referring them to an expert or dealing with difficult or abusive calls
- knowledge of safety procedures, time management and information management
- sales techniques

Good employment practice means ensuring that call handlers have the training, information and competencies they need to deal with the public and provide high quality services, and encouraging staff to obtain formal qualifications that will help them compete in the labour market.

EXAMPLE

In Amiens the Mayor, inspired by a visit to the New Brunswick region of Canada, created the first 'European university for call centres', Sup Média Com, designed to train 250 new agents each year. The intention of this college was to avoid some of the low-skill, high-turnover problems associated with call centres in other European countries by training agents to a high level and improving staff retention. There are now a number of call centres operating in the city, including Bouygues Telecom, Cabletron, Cetelem , Caisse d'épargne, Emap, France Télécom, GAN, Intra, Kertel, Nortel, SNCF, 3-Com, Vodafone and Whirlpool. The Mayor, Gilles de Robien, hoped that call centres would create 1500 jobs in Amiens over the years 2000–2002.

EXAMPLE

In 1996 Inferep and Ceritex (which between them manage 30 call centres employing around 1200 agents) launched a training scheme to produce 1,000 new agents over a period of three years. The project is run in conjunction with the Pau business school and two local lycées and is supported by the regional authority DATAR. The courses include a vocational baccalaureate, a one-year training course for those who already have post-baccalaureate qualifications, and a supervisor's course (one year apprenticeship, for those with a post-baccalaureate qualification). The scheme also provides practical work experience in call centres.

3   **RECRUITMENT, TRAINING AND STAFF DEVELOPMENT** CONTINUED

Examples of good practice include:

- Liaison between employers, local training providers and other social actors to develop up-to-date and relevant courses for call centre operators, managers and team leaders, with the emphasis on developing transferable skills and formal qualifications, in call handling and customer services, in call centre management and in information technology
- pre-employment training and induction for all new call centre staff, including agency workers
- providing opportunities for wider learning development and acquiring further skills (or training for management or team leader posts) through open learning centres, on-line learning and language courses
- supplementing formal training courses with on-the-job training and coaching, allowing sufficient time and resources for team leaders and others to support staff in learning and development

- developing team-building through workshops, training courses and constructive team meetings, with the use of expert facilitators where necessary and appropriate
- involving unions and staff in carrying out training needs analyses, developing course content, planning training provision and selecting training providers
- making training available to all staff, whether full-time, part-time or temporary, including home-based call handlers
- inviting staff to give feedback on training methods, timing and content, to enable it to be improved and kept up to date and relevant to the job, and ensure that enough time is allowed for the different types of training required
- participating in life-long learning schemes which give staff greater choice in developing career options in other sectors, including providing study leave and scholarships.

EXAMPLE

One Bulgarian call centre company provides scholarships for talented students to study both in Bulgaria and abroad. This is seen as part of a broader recruitment and retention package designed to attract skilled staff and reduce turnover.

EXAMPLE

One UK call centre has introduced an 'island' arrangement of workstations in order to promote 'at desk' on-the-job training by team leaders and encourage informal learning and socialisation at slack times.

4 Working hours

This section covers:
- general working time issues
- the legal position
- working hours
- breaks
- shift systems
- emergency call-out
- overtime
- flexible working
- part-time work
- welfare and transport facilities
- working hours

>> Introduction

Working time arrangements are a critical issue in call centres, both for managers and for employees. Service providers are under pressure to maximise availability and maintain profitability in increasingly competitive markets, operating round the clock to meet demand or cater to customers in different time zones. Managers are under pressure to maximise productivity and minimise costs, sometimes imposing performance targets that have to be implemented with split-second precision. Team leaders are under pressure to ensure that their teams meet or even exceed these targets. And call handlers are under pressure as a result of intensive work combined with demanding shift arrangements and restrictions on their movements and activities, affecting both their work and personal lives.

Good employment practice in call centres involves managing working time flexibly and treating call centre workers as fully rounded human beings with the physical and emotional needs that this implies.

>> General working time issues

Working time arrangements have important implications for health and safety and for equal opportunities. The human body was not designed to sit for long periods in a confined position, or to work at night, (that's the time the body uses to rest, recover and restore itself) or to function without adequate natural light, rest and exercise. Society does not organise community, family or personal lives around rotating shifts to suit one household member – schools, childcare and transport facilities do not operate round the clock, families do not sleep well in shifts, and meal times at home are important for social as well as nutritional reasons.

People – and their work and home relationships – can be damaged by unhealthy or unmanageable working time arrangements. They need a positive work-life balance, but many call centres still fail to recognise this. Failure to take these factors into account can create real difficulties for call centre employers and employees alike, resulting in recruitment and retention costs, high sickness absence and stress levels, loss of trained and experienced staff, and lower productivity and morale.

>> The legal position

EU law requires employers to ensure that employees' health and safety is not put at risk by their working time arrangements. Employers must comply with statutory requirements for maximum weekly working hours, rest breaks, breaks between shifts and limitations on night work. It also provides for a minimum of 4 weeks' paid holiday leave a year. The 'Working Time' Directive [Directive 93/104/EC] applies to all EU member states, and all workers, including part-time, temporary and freelance staff. National laws

4   **WORKING HOURS** CONTINUED

in EU member states should therefore cover all call centre workers.

There are also special requirements for working time arrangements to be temporarily adjusted (without loss of pay or entitlements) for expectant, new and nursing mothers at work, where working time arrangements could be harmful to their health or that of the child. If such adjustments (e.g. reducing working hours or switching from night work to day work) are not possible, then the law allows the employee to be temporarily suspended from work on medical grounds (again without loss of pay or entitlements) until it is safe for her to return. The 'Pregnant etc. Workers' Directive [Directive 92/85/EC] covers all employees who have notified their employers that they are pregnant, have recently given birth or are breastfeeding.

EU law also states that employers must
- provide equal (pro rata) treatment for workers on part-time contracts (The 'Part-time Workers' Directive [Directive 97/81/EC])
- provide entitlements to maternity leave (The 'Pregnant etc. Workers' Directive [Directive 92/85/EC]) and parental leave The 'Parental leave' Directive [Directive 96/34/EC]

These laws are particularly important in call centres because the majority of workers are women and many of them work part-time.

Many countries also have national regulations covering working time that apply equally to call centre employment.

>> Working hours

Working hours in call centres depend on various things, including the type of service involved and the call centre's operating hours, variations in call volume and levels of demand, the customer base, the time zones served by the call centre and staffing levels.

Many call centres operate a two-tier system: a full range of services available to all callers during normal operating hours (when all call centre activities are carried out) combined with 'out of hours' services such as emergency call-out and support services, when a restricted level of services is provided. Others operate around the clock providing a full range of services at all times.

The type of service or mix of services a call centre provides may dictate its operating hours. But operating hours are also affected by variations in call volume and levels of demand. These may fluctuate according to the time of day, the day of the week, or the time of year. For example, demands for emergency services often peak at night, whilst demands for home shopping or customer services often peak in the run-up to Christmas or when a new product or service is being promoted. Many call centres have to deal with very significant changes in demand, resulting in fluctuating staffing requirements to match that demand.

Managing working time, staffing levels and shift patterns to match fluctuating demands is therefore a major challenge for call centre employers. Failure to manage these issues effectively can lead to poorer quality services for customers, increased stress and sickness absence for workers, and operational problems, retention and recruitment problems and reduced productivity for employers.

>> Breaks

Breaks are needed within working time for a number of personal or work-related issues, including adjusting the workstation, consulting with colleagues or team leaders, refreshment (especially fetching drinking water), screen breaks, visiting the toilet, periodic rest and exercise (away from the workstation) and recovery after difficult or stressful calls

Key issues here are whether call handlers can take breaks when they need to, and have flexibility about their timing, what restrictions are placed on workers' movements away from the workstation, the number of breaks that can be taken, and the duration of breaks.

Electronic monitoring systems, performance targets and criteria, automatic call routing systems and company rules and regulations can all have an impact on workers' ability to take necessary breaks in working time. Care is needed in the design of systems and the way rules are formulated. Failure to allow for breaks and for reasonable flexibility and freedom of movement can lead to serious health and safety problems, discomfort and poor job satisfaction, which can in turn affect retention and recruitment of staff and staff morale.

EXAMPLE

In Bulgaria, the Ministry of Health has established policy directives on the prolonged use of display screen equipment. 15-minute breaks must be allowed every hour.

EXAMPLE

In the N Brown Group Customer Call Centre in Manchester (above), operators are provided with canteen facilities, relaxation areas in which to take their breaks and a staff gym.

EXAMPLES

In one UK call centre, call handlers can take screen breaks away from their workstations at their own discretion (subject to meeting overall targets) and can also get time off – with support from a team leader if requested – after difficult, distressing or abusive calls.

In another, call handlers are free to move around and talk to colleagues, read or rest as long as workloads are adequately covered and team-based targets are met.

In another, breaks can be taken if and when needed – without stringent controls – in recognition of the potential stress of work involving certain types of call.

4 **WORKING HOURS** CONTINUED

>> Shift systems

Managing working time in call centres with extended operating hours involves managing shift systems. Larger call centres may have as many as 15 different shift patterns, often tailored to take advantage of particular groups of workers, such as women with family responsibilities, or students who also have to take time to study or attend courses.

Care is needed in the management and design of shift systems, to allow flexibility and choice for staff to meet their needs and preferences regarding their shift patterns and working time arrangements, to consult staff and worker representatives on this, and to avoid short-notice changes in rostered duties. It is also important to avoid 'back-to-back' shift working.

EXAMPLE

In a large Scottish call centre, staff are consulted about shift patterns. There are agreed core operating hours and a choice of working patterns and shift arrangements. On average, full time staff work one Saturday in four. Rosters are organised well in advance. Short-notice changes by management are avoided.

>> Emergency cover and/or call-out

Emergency services often work round the clock, using call centres as their main contact point. Demand for their services is often highest at night and over weekends and public holidays when normal services are unavailable.

Call centres may also have on-call arrangements where additional staff can be called in at short notice in the event of particular emergencies such as major accidents, disasters or severe weather conditions when there is a sudden short-term demand for extra information or emergency services. Where emergency cover means working overtime or additional shifts, care is

needed to ensure that compensatory rest is given at the earliest opportunity, to avoid excessive working hours, fatigue and stress. Working what is effectively a double shift can lead to serious health and safety risks, such as falling asleep at the wheel on the way home, and increased errors at work.

EXAMPLE

In a large call centre providing emergency cover involving safety-critical work in the telecommunications sector, emergency cover is provided on a rostered basis, with additional compensatory time off immediately following the emergency duty period, especially where this involves night work.

>> Overtime

Call centres faced with sudden fluctuations in demand, network failures or recruitment and retention problems may need to call on their staff to work significant amounts of overtime, unless they can draw on other resources to help to meet the demand. It is good employment practice in general not to rely on overtime working to meet normal service requirements, but there are times when additional staff may be needed. Care in planning appropriate contingency arrangements can help to avoid the need for excessive or compulsory overtime working.

EXAMPLE

In Spain, the new collective agreement for companies in the telemarketing sector establishes a 39-hour working week that cannot exceed 48 hours

EXAMPLE

To prevent staff leaving the company and in recognition of the stressful nature of the work, a French call centre has reduced working hours from 35 to 31 hours 20 mins per week rather than increasing overtime.

>> Flexible working

Flexibility is an important issue in working time arrangements for both managers and staff. Managers need to match staffing levels to levels of demand at the workplace, but this needs to be balanced against workers' needs to combine their work and personal lives and/or family responsibilities.

The challenge for call centres here is to make it possible for workers to have planned personal lives and deal with unforeseeable events and emergencies both at work and at home whilst at the same time meeting the needs of the business. The problems can be more difficult to solve if there are recruitment and retention problems or high levels of sickness absence in the call centre. Addressing recruitment and retention issues can also help to facilitate flexible working.

>> Part-time work

Part-time work is one way of attracting staff to work in larger call centres with extended operating hours. It is often described as a form of flexible working suitable for people with caring responsibilities, but unless there is also flexibility for the part-time workers themselves, and unless they can reasonably predict their working hours and rostered duties in advance, then working part-time is not necessarily an advantage.

Part-time working can take many forms in call centres – regular short shifts (e.g. early mornings OR evenings) or full shifts for only part of the week, or working only at the weekend, or working full shifts all week but only on alternate weeks, are just a few examples.

EXAMPLE

A UK retail sector call centre has established a 'bank' of sessional workers (mainly students) who are willing to come in to work in the call centre at short notice, without ongoing contractual obligations on either side, to meet fluctuating demands or to supplement existing staff during staff shortages (e.g. during flu epidemics or peak holiday periods)

4 **WORKING HOURS** CONTINUED

>> Welfare, transport and working hours

For call centres operating round the clock or outside normal office hours, welfare and transport arrangements need to be addressed at night and early in the morning.

Shift workers and night workers need access to suitable refreshment facilities, somewhere to obtain and consume hot food if possible (especially in cold weather), and suitable first aid, security and emergency cover. Transport facilities may also be an issue where call centres are situated on outlying industrial estates or in rural areas.

Finance sector unions in the UK have negotiated agreements with call centre employers to ensure that night workers have access to:

- cooked food on the premises, with adequate meal breaks and access to appropriate canteen and rest facilities
- the same access to first aid and emergency response facilities that exist for day workers
- night-time security on site and in car park areas, and well-lit car parks with CCTV in outlying or remote areas or where there is a high crime rate
- arrangements to promote car sharing for transport outside public transport hours, or alternative transport arrangements paid for or subsidised by the employer

Examples of good practice include:

- planning ahead to ensure that staffing levels and skill mix are sufficient to meet demands for services at all times
- considering the use of alternative call centres to deal with overflow or fluctuating demands – for example, by networking several call centres together into a 'virtual' call centre, employing home-based call handlers (on comparable terms and conditions of employment) or initiating outsourcing arrangements
- ensuring that automatic call routing and electronic performance monitoring systems are designed to distribute work evenly, allow for flexibility, and let workers take the breaks they need
- allowing reasonable flexibility in the timing, number and frequency of breaks taken, and permitting freedom of movement away from the workstation
- ensuring that workers are not required to work excessively long hours, and that working time arrangements and shift patterns are designed with adequate breaks between shifts and avoiding double shifts or 'back to back' shift working

- providing 'break out' areas for rest and refreshment and contact with colleagues away from the workstation
- designing shift systems in consultation with workers and their representatives
- avoiding compulsory overtime, compulsory evening shifts or night work, or compulsory weekend work
- providing good advance notice of rosters and avoiding short-notice changes in rostered duties
- making appropriate contingency arrangements to deal with emergencies and other unforeseen events, transport problems or system failures (and any consequential backlog) staff sickness or fluctuating demand
- taking account of individual needs and preferences and taking a positive approach to work-life balance and family-friendly working hours – for example, allowing shift swaps and choice over working hours, shift patterns and holiday leave arrangements (subject to skill mix requirements)

5 Work organisation

This section covers:
- organisational structures, management and supervision
- team working and job content

>> Organisational structures, management and supervision

Organisational structures in call centres vary according to the range and scale of services provided, the type of company or organisation involved, the size of the organisation and its links with other organisations. Despite these differences there are also some common features, including relatively 'flat' management structures and, in many cases, the use of teams led by team leaders.

The importance of technology in call centres is often reflected in management structures, with a high priority given to information management, ICT systems and design issues at senior management level. Senior managers often have responsibility for technological systems governing overall workload distribution, resource management and performance targets, market position or competition for contracts for call centre services. Team leaders or supervisors may have to deal with human resources, shift arrangements or individual performance management issues.

This separation of target-setting and performance management can cause problems if people are not consulted about targets, or if targets keep changing, because the people setting targets may not be directly involved with those having to implement them. It can also lead to severe pressures on team leaders as well as team members, especially if there are recruitment and retention problems.

Good employment practice involves ensuring meaningful consultation and effective communication and involvement at all levels of the organisation and between all the interest groups involved, including employees and their representatives.

>> Team working and job content

Team working is a common feature of call centres. Team size varies – some teams are as small as three or four team members to each team leader, others as large as twenty-five or thirty. Generally, ratios of team leaders to team members are higher where the work is more complex or demanding, or where more support and possibly also real-time monitoring is needed – as in the case of telephone advice lines, for example. Ratios of 1:10 or 1:12 are considered manageable in many cases – if teams are too large, the team leader may not have enough time to provide coaching and support and carry out the necessary administrative work.

Teams may be structured in various ways, with a division of labour between different teams, or they may all do the same work. For example, teams may be organised:
- around a particular function, contract, service or product
- around a particular client or client's customer base
- around a particular group of customers or callers
- around a particular level of response (e.g. dealing with complaints or complex problem-solving, technical support or in-depth advice)
- around particular tasks or activities (e.g. inbound or outbound calls, e-mail contact or telephone contact, sales or follow-up)
- around specific projects (e.g. research projects, surveys or promotions)
- around particular languages, forms of communication or user groups
- in particular locations or physical locations within the call centre

5 **WORK ORGANISATION** CONTINUED

The organisation of teams in call centres is often reflected in the physical layout.

Alternatively a call centre may have 'generic' teams handling all inbound or outbound calls, all tasks and all forms of contact, including e-mail, text messaging and other e-contact points.

There are advantages and disadvantages to each of these diverse arrangements. Generic work, for example, may mean dealing with a wider range of calls and more varied call content, but it may also mean less specialised or in-depth content knowledge. More specialised work with a single focus may in turn allow more job satisfaction but may mean less variety and more repetition.

Lack of variety, boredom and repetition is a common complaint about call centre work, and therefore job content is an important issue. Call centre jobs that involve sticking rigidly to a pre-set script, including pre-set forms of greetings, can be particularly monotonous, especially if call handlers have little or no opportunity to exercise their own judgement or handle calls in different ways.

Some call centres have addressed these problems by replacing pre-set scripts with screen prompts, removing rigid call handling time limits, and allowing call handlers to

conduct calls and transactions within agreed guidelines, using their own judgement and personal approach in the process. Some have given operators more responsibility, for instance a discretionary sum of money they can spend to compensate a dissatisfied customer, and have found that doing so not only increases job satisfaction but also reduces the overall amount of compensation that ends up being spent.

Others have reduced monotony by introducing job rotation or task rotation within teams, so that the type of calls and activities handled by the team as a whole vary at different times. Some allocate different tasks within the team, and then rotate within the team. Another option is rotating membership of different teams, so that workers move from one team and one type of activity to another. A more radical option (but one that is not always feasible) is to consider rotating people between different types of work, alternating call centre work and non-call centre work in the same local area within the wider organisation, so that workers are not employed exclusively in call centre jobs.

Many call centres deliberately encourage competition between teams. Team performance targets are used to get teams to compete against each other in ways that can be unhealthy and divisive, resulting in lower morale, increased risks of stress and burn out, resentment and reduced productivity. Experience suggests this can be counter-productive for both managers and call handlers in call centres.

Productive team working requires effective two-way communication, co-operative and supportive team relationships and positive team leadership.

Good practice in this area means allowing time and resources for team building and for training and developing team leaders, and granting team members more autonomy in the way they carry out their work.

EXAMPLES

In Spain, a company providing outsourced call centre services for a telecommunications company has to deal with changes in services and clients that necessitate continuous organisational changes and technical innovations. These changing demands entail extra training. In the call centre, 10% of the annual work is dedicated to continuing training and development.

EXAMPLE

In Italy, another telecommunications company is experimenting with forms of work organisation based on self-directed teams where four workers are employed as home-based teleworkers.

EXAMPLE

In several UK call centres, special agreements for homeworkers have been established, including measures to ensure that they are not isolated from their 'virtual teams'. These measures include regular contact with team leaders at agreed times, and opportunities to take part in workplace training and social activities, as well as telephone, e-mail and fax contact with colleagues and team leaders. In another call centre, a charity specialising in helplines and support services, team size is kept as small as possible (with ratios of 3 or 4 workers to each team leader) to enable sessional advice workers to have close contact with team leaders providing active support, advice and assistance.

An American trade union, the Communication Workers of America, with a large number of members in call centres, contrasts the 'sales' model of work organisation found in many call centres in which workers are pitted competitively against each other with the union's alternative 'professional' model in which workers are encouraged to co-operate and support each other and which has been found to reduce stress and lead to lower staff turnover and improved performance.

Sales model	Professional model
Learn alone	Learn together
Hide 'tricks of trade'	Share 'tricks'
Work harder	Work smarter
Higher stress	Lower stress
Divide workers	Unify workers
The 'star' model	The 'Solidarity' model

In a study carried out by Dr Rosemary Batt of Cornell University covering 350 call centres in the telecommunications industry in the United States it was found that the annual 'quit rate' in unionised call centres was only 8.5% compared with 17.7% in non-unionised centres.

Debbie Goldman, Communication Workers of America, presentation to TOSCA seminar, Paris, 24 September, 2002
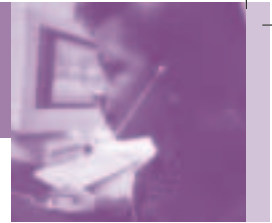
6 Managing a flexible workforce

This section covers:
- Finding the right balance between flexibility and stability
- Staff retention
- Part-time workers
- Homeworkers

>> Finding the right balance between flexibility and stability

One of the main challenges facing call centre managers is to find an acceptable balance which on the one hand ensures that there are optimal staffing levels to meet fluctuations in demand but on the other avoids the creation of a transient and disposable workforce with little commitment to the business.

This is tackled in very different ways by different call centres. Some call centres (especially smaller ones) rely entirely on permanently employed staff, and use overtime working as a means of dealing with periods of peak demand. But others may be heavily dependent on temporary, casual or agency workers to add extra capacity when needed. Some may also use homeworkers as an overflow workforce, whilst others divert surplus calls to external call centres when call volumes are high (either outsourced call centres or other sites within their own company network). Still others work with high staffing levels, designed to cope with the maximum expected demand and in quiet periods use the spare capacity in their own call centres to accept overflow (outsourced or re-routed calls) from other call centres.

The challenge is considerable. On the one hand it is necessary to avoid excessive levels of turnover and retain a loyal and motivated group of employees; on the other, large teams of part-time or home-based staff have to be managed effectively. This requires a two-pronged strategy: a focus on staff retention combined with flexible employment policies and practices. These are addressed in more detail below.

However it is worth emphasising here that it is generally a mistake to make sharp distinctions between a 'core' workforce of permanent full-time staff and a 'periphery' of transient part-time, temporary or home-based staff. An effective retention and flexible working policy allows for considerable movement between these groups, enabling full-time staff to reduce or change their working hours in response to changing personal demands and creating opportunities for part-time, temporary or home-based staff to move into more permanent or senior posts as their circumstances change (for instance when young children start school, or a college course is completed).

EXAMPLES

Some companies have tried to respond to requests from agents and trade unions for greater professional development by introducing horizontal mobility career paths. This is the case in a French company where it is difficult to get promotion in the call centre but easy to get transferred to other departments where greater specialisation can be acquired.

Another case is represented by a telecommunications company that responded to the problem by proposing horizontal mobility to the workers and greater complexity of work content and activities. This is the 'one representative solution' where the same agent manages the relationship with a client every step of the way, with thorough knowledge of the company organisation and where to get information.

>> Staff retention

High turnover is a common problem in call centres, particularly in larger call centres and if the work is boring or repetitive, if terms and conditions of employment are poor by comparison with other jobs in the area, or if there are few opportunities for career or skills development. High turnover is expensive – it means higher recruitment and training costs for call centre employers, and loss of experienced and trained staff. Good management of staffing arrangements can make an important contribution to stability in the workforce.

Call centres have addressed these issues in a range of different ways.

EXAMPLE

An Irish call centre that employs young foreign nationals as well as young Irish people with insufficient language skills to handle calls in languages other than English offers training to improve language skills for all agents, enabling them to handle calls in more languages and earn higher wages.

EXAMPLE

In Belgium, in a call centre where the turnover rate is extremely high (reaching 50% annually) the management has modified its own organisation models, attempting to retain some workers by diversifying the activities.

Examples of good practice include:
- agreeing reductions in the proportion of temporary, casual and agency staff employed and increasing the number of permanent posts
- introducing greater flexibility and autonomy into the way work is carried out and the range of work undertaken by call handlers and teams
- introducing pay progression linked to length of service and experience
- improving the overall package of conditions of employment
- improving the work environment
- developing new ways of recruiting staff
- being more flexible about working hours and shift patterns
- having attractive, purpose-built, ergonomically sound work environments designed in consultation with employees and their representatives
- conducting exit interviews with staff to find out why they are leaving the organisation in order to identify areas of improvement
- providing study leave and other access to education and training
- improving working relationships – for example, by training team leaders, providing more positive feedback, introducing anti-bullying and anti-discrimination policies, and encouraging co-operation rather than competition as a means of achieving objectives
- relaxing performance targets and monitoring functions (or even removing them completely)
- developing as a 'learning organisation', encouraging and enabling managers, team leaders and staff to acquire new skills with the help of open access to learning resources
- providing improved welfare facilities, such as subsidised sports and leisure facilities, crèche facilities, a canteen or restaurant, on-site shopping facilities and subsidised transport to and from work outside normal public transport hours

6   **MANAGING A FLEXIBLE WORKFORCE** CONTINUED

EXAMPLE

In an Italian call centre the management decided to give workers a permanent contract in order to create a satisfying and motivating environment. The company's objective, by specific request of the contractor, was to give security to the workers so they would not be worried about the risks of precariousness. The principle is that a satisfied workforce will be more committed to the work and especially to customer relations.

EXAMPLE

In Germany, a call centre with a low staff turnover rate is located in a rural area where it is one of the largest local employers. Most of the employees are permanent and have career prospects within the company. The office space is very attractive and measures are taken to motivate staff. Although working conditions are not perfect, much more value is placed on employees than in some call centres with higher turnover rates.

EXAMPLE

In Bulgaria, there is consistently high turnover amongst young highly-educated call centre agents. Some leave in order to find work in other sectors whilst others seek opportunities abroad. In the case of a Bulgarian outsourced call centre, all call handlers working for external companies are given the opportunity to to transfer on a short-term or longer-term contract to the company headquarters. Some of these agents return to Bulgaria and are able to find more senior positions as a result of the experience gained in this way. Others find other work abroad, in line with the general trend of emigration of young people. Another career path is to join customer services departments of other companies at a higher level, sometimes managerial.
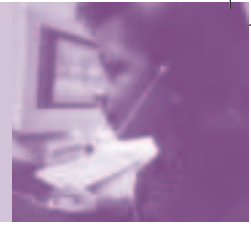
EXAMPLE

A call centre in Bulgaria has managed to attract and keep high quality staff as a result of providing good salaries, conditions and training opportunities. According to a manager interviewed by the TOSCA project, 'Over 80 percent of our employees have a higher education. I can definitely say that they consider the company as their own, they feel stable in it. It is not only the high salary that keeps our people with us. The company provides not just possibilities and courses, but programmes for professional development and continuous education. In the company our employees (33 years of age on average) work with cutting-edge technologies, feel themselves professionally integrated in Europe and the world and don't need to dream about emigrating.'

>> Part-time workers

Many call centres offer both full-time and part-time jobs. People work part-time in call centres for different reasons – many are women with family responsibilities, some are students, others work part-time from choice. Others have no choice, either because it is the only work available in the area, or because it is the only work available at the times when they are free to work.

Whatever the reasons, part-time workers should not be treated as second-class citizens at work or penalised because they do not work full-time. They should be able to attend team meetings and other work-based activities within normal working time, and should not be excluded from consultation about decisions affecting their working lives.

Examples of good practice include:

■ Giving part-timers the same pro-rata entitlements to pay and non-pay benefits as their full-time colleagues, and the same access to opportunities for training and development, transfer and promotion, health and safety, employment protection and union representation.

■ When calculating leave arrangements, giving part-timers pro rata entitlements to leave, taken over the same period as their full-time colleagues (i.e. if a full timer gets 20 days' paid annual holiday leave, paid at the full-time salary, then part-timers should get 20 days' leave, paid pro rate on the part-time salary, not 10 days leave instead of 20)

■ Arranging meetings and training courses to be held at times when part timers can attend as part of their working week.

EXAMPLE

In a large outsourced call centre, staff are asked to indicate their preferences for new rotational patterns, split shifts, shorter weeks, longer weekend shifts, school holiday shifts and other working pattern changes. Pay and conditions are pro-rata for part-timers. These changes have proved popular with call centre workers.

EXAMPLE

In an on-line health advice and referral service, part-time call centre advisors are welcomed. Service demands fluctuate, and part-time workers help to meet this demand. Advisors can chose their shift patterns, subject to service requirements, and there is flexibility if they need to adjust their working patterns temporarily.

>> Homeworking

Home-based call handling is on the increase. Homeworkers are networked together in a 'virtual' call centre linked to a central computer and possibly also a central call centre. Automatic call routing systems, computer information systems and electronic performance monitoring systems mean that home-based call handlers can be managed remotely and their work can be distributed and monitored electronically.

Home-based work is sometimes popular with working parents, carers and disabled people. However it is not without its problems, and there are examples of both good and bad practice in home-based call handling.

Home-based call handlers face many of the same problems as homeworkers generally – for example:

■ the home may not be a suitable work environment

■ health and safety standards may be lower – homework is generally less easily regulated than other work and is less likely to be subject to inspection

■ work may intrude on home life, and vice versa and homeworkers may face conflicting demands from work and family members

■ home-based work can be isolating and stressful because of the lack of face-to-face contact

■ it is more difficult for home-based workers to get together and discuss their problems and take an active part in training activities and feedback sessions and in trade union organisation.

Other problems are more specific to home-based call handlers. They include:

■ lack of privacy, especially if electronic monitoring also affects movements and activities within the home, or if home telecommunications systems are occupied by work communications

6 **MANAGING A FLEXIBLE WORKFORCE** CONTINUED

- unsuitable work space and workstation design or set up, especially if the home is shared with other people
- unsuitable work equipment, unless practical steps are taken to supply, install and monitor the correct equipment and its correct use

Home-based call handling can however provide positive opportunities for employment when it is managed properly and regulated and chosen voluntarily.

EXAMPLE

In the UK, a number of large companies have set up homeworking schemes for call handlers, including the Abbey National and HSBC banks, Prudential Insurance, Nationwide and the Alliance and Leicester financial services companies, and the AA motor vehicle rescue service. In most cases improvements in staff retention rates have been reported, as well as improvements in productivity.

Examples of good practice include:

- consulting union representatives and drawing up a joint agreement on the principles and standards to be applied when employing homeworkers
- ensuring that homeworkers are employed on comparable terms and conditions of employment as their colleagues in the main call centre (if it exists)
- consulting homeworkers and their representatives about their needs and preferences regarding location, hours and patterns of work
- agreeing boundaries for working time and make sure that homeworkers are able to meet any personal responsibilities they have at specified times (e.g. collecting children from school or taking dependant relatives to hospital)
- checking that the designated work area in the home is safe and suitable for call handling work activities and equipment
- supplying ergonomically suitable equipment and workstations and training homeworkers in safe working procedures
- providing regular opportunities for homeworkers to meet colleagues and team leaders face-to-face, take part in training days and social activities, and have one-to-one feedback and coaching
- providing information about trade unions and facilities for union representatives to meet and communicate directly with homeworkers
- allow for team leaders to visit homeworkers in their homes at agreed intervals, to provide support, monitor the work environment, provide feedback and discuss any issues of concern to either the team leader or the homeworker.

7 Performance monitoring

This section covers:
- performance monitoring
- targets
- assessment criteria
- feedback

>> Introduction

Many call centres use various forms of performance monitoring to achieve targets and monitor call content and service delivery.

Often several methods are used at once to monitor performance, including:
- electronic performance monitoring systems (where calls are recorded and data is automatically collected). Team leaders or monitoring team members may also listen to the recordings after the call has taken place
- real-time 'active' monitoring (by team leaders or by a designated monitoring team) who listen in on calls as they are taking place
- 'mystery shoppers' – people posing as bona fide callers who 'test' the quality of service or response provided by a random sample of call handlers
- market research surveys (sometimes carried out by workers in other call centres)

Monitoring can be used to achieve one or more of the following objectives:
- performance measurement (quantitative and qualitative)
- performance management (linked to performance targets and assessment criteria)
- pay determination (linked to performance related pay)
- as an aid to training, development and coaching of staff
- as a quality assurance measure, especially for safety-critical work or work involving significant legal liabilities
- as an aid to the planning and provision of services to match levels of customer demand

- to inform management decisions about staffing and training requirements
- to control call volume, work flow or pace of work
- to control call handlers' movements and activities

Performance monitoring can include gathering quantitative and qualitative data about:
- individual performance within the call centre or a network of call centres
- team performance, and/or relative performance within a team or between teams
- the performance of the call centre as a whole
- the relative performance of different call centres within a networked group of 'virtualised' call centres

There is a worrying trend in some countries to use records of computer screens obtained in the course of performance monitoring for disciplinary purposes. Electronic performance monitoring has other serious drawbacks, especially if it is used in a punitive way. The problems include:
- perceived lack of privacy (especially if call handlers' private movements away from the workstation are monitored)
- increased pressure and risks of work-related stress for call handlers
- pressure to skip breaks that place people's health at risk
- excessive time spent on inappropriate performance monitoring activities
- wasting time and resources collecting statistics that are not in fact of value to the service or the end user ('counting for the sake of counting')
- unrealistic, inappropriate or inflexible performance targets that conflict with improving service delivery or customer satisfaction (e.g. arbitrary time limits on calls, rigid adherence to pre-set scripts etc)

7 **PERFORMANCE MONITORING** CONTINUED

- using 'mystery shoppers' to provoke call handlers into making errors, by deliberately bringing undue pressure to bear on them
- failing to take account of the diversity of calls or variable factors involved in call handling when setting targets and measuring performance against them

Good practice in this area means managing performance (with or without electronic monitoring systems) in ways that promote a positive, healthy and productive work environment and good team and customer relationships.
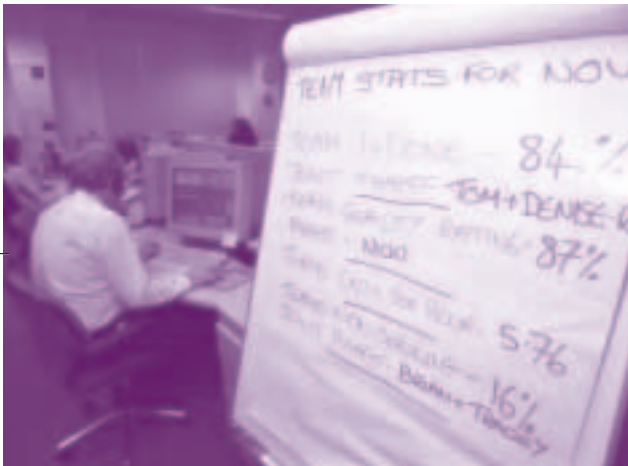
In this UK call centre, team statistics are displayed on a flip chart. Competitive pressure can be a major contributor to operator stress.

Examples of good practice include

- joint agreements on performance monitoring and assessment criteria, ensuring that criteria are relevant, clearly set out and as objective as possible
- agreements covering how and when people are able to log off the system, and the extent of information they have to supply when doing so
- allowing flexibility in how the job is done, and how long it takes, so that the ethos for customer service is 'done and won' or 'done and satisfied' rather than 'done in a rush' or 'done by rote'

- agreements limiting the use of electronic surveillance in the workplace
- allowing adequate time and resources for staff training and coaching, linking performance management to training and development programmes

EXAMPLE

Italian legislation of 1970 ('Workers' Charter', article.4) is designed to safeguard the worker's dignity and privacy. It forbids the employer to use remote control devices, whether they are audio-visual or computer-aided, without the worker's knowledge and without the approval of the union representatives in the company. The 1970 law incorporated and specified the fundamental values of the Italian Constitution on the right to dignity and confidentiality (articles 13 and 15).

In some telecommunications cases collective bargaining has adapted the ban on remote surveillance mechanisms to specific company requirements. In the 1980s, pioneering union agreements against the tapping of inbound and outbound calls from extension lines of the company switchboards were stipulated in Telecom Italia. Similar regulation has recently been agreed with the unions in the same group, which is also the largest company that manages call centres in Italy.

The legislator has recently issued new norms on IT offences (law no 547/93) and on electronic documentation (law no. 513/97) for the protection of all citizens and not only employees. In order to protect these rights, the Guarantor of Privacy has recently stated (communication 23) that Electronic Mail must be considered as private correspondence and as such cannot be violated.

These agreements are not always adhered to, however.

In Belgium, there is now a collective agreement on the installation and use of cameras in the workplace. A collective agreement is being negotiated with regard to the right to privacy at work. Discussions were started in the National Labour Council with regard to the right to privacy at work. To date, privacy legislation is in force and, in principle, monitoring of conversations is forbidden. Since nevertheless this does occur in practice (particularly in the call centre sector), the social partners are trying to come to a transparent settlement. Regulation on the installation and use of cameras has already been integrated in a new national agreement.

>> Targets

Targets can be set for individuals, teams, specific sections or services and for the call centre as a whole. For each statistic that is collected and analysed, there is a specific target. However care is needed in setting these targets – they need to be achievable and any obstacles to achieving them need to be recognised and allowed for. Unrealistic or constantly changing targets can be a major source of stress in call centres.

Quantitative monitoring measures performance against specific quantitative performance targets. For the individual call handler or team it can cover:

- the number of calls handled in a given period of time (and/or average numbers)
- the percentage of time that a call handler spends on the telephone (and/or average percentages of time spent)
- the time taken to respond to calls
- the time taken in handling the call and in completing the call ('wrap time')

Systems involving automatic call routing can also collect data about specific types of call and/or specific callers and can link this to information gathered from other databases.

Some systems also monitor call outcomes in terms of the number, value or type of sales or orders completed, or the type of advice or information provided. For the call centre as a whole, or for teams dealing with specific types of call, the system may also monitor:

- average call waiting time
- the longest waiting times faced by callers
- call abandonment rates

Quantitative monitoring can also involve monitoring call handlers' activities away from the workstation, a matter of particular concern. Some integrated systems require call handlers to log on and off the system, giving reasons, for any time taken away from active call handling duties. The system then collects comparative data about time spent going to the toilet, fetching drinking water, taking part in union activities or having rest breaks. This can be linked to data about the proportion of time spent actually handling calls, and can even form the basis for disciplinary action if it is deemed to be excessive. Targets for actual call handling time vary, with some call centres demanding that people spend as much as 80% of their working time on calls, while others say the figure should be somewhere between 60–70%.

Following industrial action in its UK call centres, a major employer entered into a new agreement with the union to address concerns about levels of stress and dissatisfaction. As part of this agreement, team-based performance targets replaced individual performance targets, and monitoring practices were modified. In another call centre in the insurance sector, individual performance targets were abandoned – productivity is reported to have risen sharply as a result, with less time spent in disciplinary meetings and more time spent actually on the job answering calls. In another, performance targets have been relaxed to allow more time for training, breaks and health and safety measures.

7 **PERFORMANCE MONITORING** CONTINUED

>> Assessment criteria

Qualitative monitoring involves using assessment criteria rather than statistical targets. These can cover a wide range of issues that can be less easy to measure and more subjective. Examples include:

■ accuracy of information provided
■ customer relations / interpersonal relations skills
■ communications skills
■ diagnostic and problem-solving skills
■ professional judgement (e.g. in telephone advice services)
■ language used and tone of voice
■ how closely the call handler sticks to the script
■ whether screen-prompts are used properly
■ how difficult or complex calls are handled

EXAMPLE

In a UK on-line health advice service, performance assessment is carried out not only at individual and team level within the individual call centre, but also across the service as a whole. Assessment criteria are linked not simply to quantitative performance targets but also to qualitative issues involving clinical standards, professional judgement and communications skills. Evaluation is carried out by managers within the call centre, but also by independent auditors, service users and clinical specialists. Performance management is supported by highly qualified professionals and by a specially designed computer programme that guides and supports the advisor in providing appropriate advice, without being over-prescriptive. Key performance indicators (KPIs) are now being developed placing a greater emphasis on qualitative issues.

Qualitative monitoring means assessing actual performance against required performance standards. However these standards are not always clearly identified. They may not be clear either to the person doing the monitoring (the team leader or monitoring team) or to the call handler and may be inconsistently applied. Different assessment criteria may be given different priority by different team leaders – for example, one may prioritise sales achievements whilst another gives a higher value to sorting out problems and listening to the caller or customer's concerns.

>> Feedback

Feedback is an important part of any monitoring system, whether qualitative or quantitative. Call handlers are reported to welcome constructive feedback either at the time of the call or later in one-to-one assessment or coaching sessions. But where feedback is inconsistent or is seen to be used unfairly, it can be experienced as bullying or punitive, resulting in lower staff morale, increased stress and poor motivation.

Some call centres are investing more time and resources in providing positive feedback as part of performance management systems, and measures are taken to motivate staff. Feedback is linked to measures designed to improve performance through continuing development beyond the initial training and induction period.

EXAMPLE

In some Spanish call centres measures to improve performance include continuing training, consisting of in-depth techniques for communication and marketing, and updating skills to adapt to new technological tools. There are also frequent short preparation courses for specific campaigns.

EXAMPLE

In the UK, specialist training is provided in dealing with difficult calls and providing services to vulnerable groups or distressed callers, and feedback is given to call centre workers during this training on how they can diffuse tension, improve their communications skills and deal with calls more effectively.

EXAMPLE

In Belgium, 360% degree feedback has been used successfully in call centres to get a complete picture of an individual's performance and avoid over-dependence on a single person's (possibly biased) perspective. This has also been found useful for identifying the impact of organisational practices on performance.

examples of good employment practice:
- consulting employees and their representatives about how monitoring systems are designed and operated, and how targets and assessment criteria are set and applied
- ensuring that targets are realistic, measurable and achievable, taking account of health and safety issues and best practice in use of display screen equipment and working time arrangements
- avoiding changing targets or increasing workloads or pace of work without consultation or explanation
- including time for rest breaks, recovery breaks, communications with colleagues and team leaders and workstation adjustments when setting targets for time spent on actual calls
- recognising that not all calls are the same and that some calls take longer than others – allowing flexibility in call handling times, and taking account of system failures and quiet periods or fluctuating levels of demand

- where there are quantitative targets for call handling times and throughput, setting these for the team rather than for the individual, to allow for greater flexibility
- ensuring that team leaders or members of monitoring teams are trained in how to give constructive, objective, supportive and consistent feedback, and how to avoid bias and prevent bullying
- providing facilities to allow feedback to be given in private on a one-to-one basis, with enough time for team leaders to do this properly for all team members
- allowing call handlers to comment on performance monitoring and appraisal, and responding to those comments
- having arrangements in place for resolving disputes about performance monitoring, and for appeals in the event of disagreement
- making sure that monitoring is not used as a 'back-door' method of disciplinary action or intimidation, but is used to help improve performance, identify training or coaching needs, and support and recognise good performance

8 Health and safety

This section looks at the main health, safety and welfare issues in call centres. It covers:
- hazards and risks in call centre work
- relevant law and guidance
- risk assessment, prevention and control
- examples of good practice

>> Introduction

There is growing concern about the health and safety problems being experienced by call centre workers, evidenced in high rates of sickness absence and staff turnover. Call centre employers have the same duties in law as other employers to take steps to protect their employees' health and safety at work but many still fail to address these issues adequately. This is partly because the main risks are to health rather than to safety – they tend to involve cumulative stresses and strains resulting from a combination of causes rather than single traumatic events. It is also because, as white-collar workplaces, call centres are not obviously hazardous work environments.

>> General issues

Call centres have some common characteristics that affect workers' health and safety in particular ways because the tasks are computer-mediated. Compared with more traditional forms of office-based work, these can include 'objective changes' such as:
- new forms of work and service delivery – requiring different skills and ways of working, and sometimes different languages as well
- intensification of work – with increases in workloads, the pace of work and work pressures as well as less varied job content than some other office-based work
- standardisation of tasks and close performance monitoring leading to a reduction in workers' control and autonomy
- increases in the pace of change – brought about by rapid developments in the capabilities and operational requirements of the technologies and ICT systems involved
- requirements for round-the-clock working with changes in when different types of activities take place – with increasing demands for availability, less distinction between work and personal life, and pressures to operate in different time zones in a global marketplace.

There are also some important 'subjective changes'. Customer expectations of receiving an immediate response are much higher than in the past, as technological developments change people's perceptions of time and space, bringing with them a demand for round-the-clock availability regardless of time zone in the apparently 'immediate' virtual world of the Internet.

Call centre work involves sitting for long periods in front of a computer, taking or making calls whilst inputting or reading data. This means that the work involves simultaneous use of display screen equipment and telephony. There are important differences between this and other forms of office-based work:
- the telephone and the computer (and possibly the Internet and other media) are used at the same time
- job design is normally restricted to call handling and e-contact work, further restricting both tasks and physical movement and reducing variety of movement
- there are fewer opportunities for contact with colleagues since the main contact is with the caller or contact on the other end of the phone line
- the work can be intensive and there are often significant pressures to complete

transactions within a single contact or set time period

■ working practices and the pace of work are often 'designed in' by the technological systems in place, leaving workers with a feeling that they are out of control and being 'driven' by the system

These combined factors create particular problems for call centre workers. However these problems are increasingly being recognised, and a number of initiatives have been taken to reduce the risks for call centre workers.

Where call centre operations are separated from other business functions or locations, there is a danger that the health and safety management systems that apply elsewhere within an organisation will not be applied in the call centre. This can lead to different standards being applied and different levels of protection for different groups of workers, or to call centre workers' health and safety being ignored completely. It is important that all operations – including all call centre locations and activities – should be included within the organisation's health and safety and risk management system, so that all workers and all work activities are included.

>> The legal position

European health and safety directives cover a number of important issues affecting call centres, including:

■ The 'Framework' Directive [Directive 89/391/EC]
■ The 'Working Time' Directive [Directive 93/104/EC]
■ The 'Display Screen Equipment' Directive [Directive 90/270/EC]
■ The 'Workplace' Directive [Directive 89/654/EC]
■ The 'Work Equipment' Directive [Directive 89/655/EC]
■ The 'Pregnant etc. Workers' Directive [Directive 92/85/EC]

In EU member states, the provisions of these Directives have been transposed into national legislation. Employers in these countries therefore have a legal duty to comply with their requirements.

Specific formal guidance has also been issued to employers and health and safety inspectorates in several European countries. Call centre employers and employers' associations have started to develop standards and health and safety management systems for call centres. Trade unions have been particularly active in this area, and have issued detailed guidance on good practice and risk assessment for call centres and for home-based call handlers.

Countries outside the EU have different health and safety (and equality) laws, but still have legislation covering workers' health and safety that will apply to call centre work. There are also various ILO Conventions that are relevant to this sector.

>> Assessing the risks of call centre work

Risk assessment is a valuable tool that helps identify and solve health and safety problems. It can be applied to all work activities, including call centres, and to all risks including risks to safety and to physical and mental health.

The aim of risk assessment is to identify not only the risk but also the hazard – the source of the problem. The best way of preventing and controlling risks is to address any problems at source, either by getting rid of the hazard altogether or, if this is not possible, by reducing it to a minimum and controlling exposure to risks. Good employment practice in call centres means ensuring that risk assessments are carried out for all work activities (and any planned changes affecting health and safety at work) taking account of risks to the mental and physical health of all workers.

8   **HEALTH AND SAFETY** CONTINUED

Employers are responsible for ensuring that risk assessments are carried out, and for preventing harm at work. But it is important that workers and their representatives are consulted early on about risk assessments and workstation assessments. Workers are a valuable source of information, and have direct experience of the effects of any health and safety problems, as it is their health and safety that is at risk if anything goes wrong. They know when they experience pain and discomfort and when they feel under pressure, and they also know what makes their jobs easier and less stressful. Call handlers' knowledge of how the job is actually done can provide a 'reality check' about what is actually happening. This is important in call centres where demands and workloads may change from day to day. Involving employees and worker representatives in risk assessment can also help to raise employees' awareness of the risks and how to prevent them.

EXAMPLE

When a leading insurance company decided to set up its new call centre in Wales, the project was discussed in detail both at national and local level. The company has a partnership working agreement with the union and this was reflected in the way the union was involved in the call centre's development. The company's joint health and safety committee was fully consulted on health and safety matters and risk assessments at every stage of the project. Employees and safety representatives had input into the workplace design, planning, build, and selection of equipment, workstation assessments and monitoring arrangements.

>> Hazards and risks of call centre work

Call centre activities involve a range of hazards and health and safety risks. TOSCA's research found that many call centres in Europe were reporting worryingly high levels of sickness absence and work-related ill health. The health and safety problems arose from many causes including work organisation and working practices, the working environment, workstations and equipment, working time arrangements, monitoring systems, and health issues such as stress, postural problems and Musculo-Skeletal Disorders, acoustic shock, visual fatigue and occupational voice loss

These issues are inter-related and often exist in combination. The combined effects need to be taken into account when assessing the risks of call centre work and the impact on workers.

>> Impacts on workers

Lack of control over workloads or work flow, or lack of variety and poor job design can lead to fatigue, overload (or boredom) and work-related stress. Restrictions on movements can also contribute to other kinds of ill health, such as gastro-intestinal disorders, vascular problems and musculo-skeletal disorders, increased susceptibility to urinary tract infections and to infections such as colds and flu.

Workloads in call centres tend to fluctuate depending on the time of day (or night), day of the week or time of the year. Call centre work involves demands from different sources – callers and respondents, managers and team leaders, equipment and ICT systems, and the work environment. These demands can place both physical and mental stresses on operators. Physical impacts might include strains on the eyes, ears and voice as well as muscular stresses from constrained posture or repetitive movements. Environmental issues

also play a part here. For instance an overly hot or dry environment can lead to eye irritation and general risks of dehydration. Dehydration can increases the risk of voice strain as well as constituting a source of discomfort and a specific risk to those with certain physical conditions.

Physical demands on call centre workers include restricted or awkward posture, static load, strains on hearing, vision and speech, small muscle movements (eyes and hands), manual dexterity and repetitive movements. These demands can be extensive, repetitive and/or intensive. Their impact on workers is affected by work organisation, job design, working time arrangements, work equipment and technologies and the work environment. The risks associated with these demands can also be affected by the levels of mental demands on call centre workers, and by fatigue or lack of rest.

Mental demands are sometimes overlooked since, unlike physical demands, they are not visible to the naked eye. This does not mean however that they cannot be identified. They can range from dealing with abusive or distressing calls to pressure to meet productivity targets. A call centre worker is typically having to juggle a large number of mental demands at any given time.

Specific problems of call centre work include:

**Occupational voice loss
and acoustic shock**
Research is continuing into the problem of occupational voice loss and acoustic shock in call centres in the UK and elsewhere.

Call centre work involves handling phone calls and using computers at the same time. Traditional telephone handsets are unsuitable for these combined activities. Without hands-free phones, workers are forced to work in awkward positions cradling the handset between their necks and their shoulders, increasing risks of musculo-skeletal problems, tension headaches and RSI. Amplifiers and monitors do not solve this problem because

they add to background noise. Poor equipment can also lead to communication problems, causing problems for both caller and call handler at the receiving end.

Headset design varies but involves one or two earpieces and a microphone which may or may not be attached to a hollow voice tube which cannot easily be cleaned between use and which can get clogged with dust, fluff, food particles or saliva. This affects equipment performance and may significantly increase risks of infection. Many call centres require workers to share headsets, although manufacturers strongly advise against this. Poorly designed or badly maintained headsets can also mean other risks including acoustic shock and occupational voice loss.

Vocal problems can result from spending a large amount of time talking to people on the phone. Problems include occupational voice loss, difficulties in speaking or breathing, and increased susceptibility to cold and flu. Contributory factors include poor work environments, poor equipment design, poor script design, stress, long working hours and lack of breaks. Short-term symptoms include voice loss, coughs and sore throats. Longer-term symptoms include nodules on the vocal chords.

Acoustic shock can occur following sudden loud noise at certain frequencies – in the case of call centre workers, exposure is through earpieces and can involve piercing electronic noise that cause severe discomfort and damage hearing. Sometimes the noise is a result of equipment malfunction but there have been reports of abusive callers deliberately using noise as a 'virtual weapon' against call handlers.

Job design
Job design in call centres can range from repetitive work using pre-set scripts with little or no scope for variation or deviation from the script, to highly specialised and detailed advice services or problem-solving work in which the

call handler is required to exercise in-depth skills, knowledge and judgement. In different ways, both of these can be stressful and demanding. Varying tasks and allowing opportunities for variation in pace as well as how the job is done can be helpful in reducing associated risks of stress-related ill health and postural problems.

Postural problems, musculo-skeletal disorders and repetitive strain injuries
Call centre work requires people to sit for long periods in fixed positions, using their upper limbs to handle calls and work on the computer. They have little time to walk around, stretch or exercise while carrying out their normal tasks. Both large and small muscle groups are involved, and the body is also required to maintain awkward postures and to partially support its own weight whilst performing intensive tasks. This can lead to significant health risks.

Without changes in posture and regular opportunities for rest and exercise, lactic acid and tension can build up in muscles, causing pain and discomfort. Postural problems can cause musculo-skeletal disorders and circulatory problems as well as repetition strain injuries (RSI). There may also be increased risks to mother and child during pregnancy, as sitting still for long periods is linked to increased risks of back pain and fatigue, circulatory and back problems, premature birth, low birth weight and future health problems for the baby.

These risks are preventable. However, the longer people have to work, the more work they have to do and the more their movements and job content are restricted, the more serious the risks. Poor work organisation, poor job design and poor ergonomics all contribute to increased risks of serious work-related ill health. Long working hours, excessive workloads and stress can also increase these risks.

Workstations
Whether they work at home in a virtual call centre or in a large call centre building, call centre workers spend nearly all their working time sitting at a workstation. This comprises a computer, desk or desk surface, chair and peripheral equipment. It also covers the immediate working environment. In the home the workstation may be in a room that also doubles as living space, blurring the boundaries between home and work life. In larger call centres, 'hot desking' (where desks are shared / rotated between staff) is common and workers do not have their own personal storage or work space. They may have to find different places even within the same shift and may not be seated alongside their team colleagues.

Call centres often use workstations of a standard design (although configuration and layout may be varied). The design of the workstation is critical for workers' health and safety. Adjustability is essential, especially where workstations are used by different workers at different times. People vary in body size, shape, proportion and height. Workstations need to be properly adjusted to fit the individual worker at the start of each shift, just as car seat positions need adjustment if the driver changes. Incorrect adjustment or poor workstation design and layout can lead to significant health and safety risks including disabling conditions such as upper limb disorders, visual fatigue, circulatory or respiratory problems, and increased work-related stress. Environmental conditions vary with occupancy - changes must be assessed.

Working environments
Call centre environments and workplaces vary depending on the type of enterprise, its organisational structures, the scale and nature of the operations and technology involved, and the number and location of people at work at any one time. Larger call centres are generally accommodated in open-plan offices

but environments still vary depending on demand and occupancy levels. There may be high occupancy at peak periods and lower occupancy at other times.

Occupancy, workplace and workstation design, operating systems and equipment, layout and space all affect indoor air quality, temperature, background noise levels and ergonomics. All these factors can affect workers' health and safety and performance. Smaller call centres may have evolved in accommodation that has not been designed for this purpose, or which has outgrown its original use. These premises may not be suitable for intensive call centre operations, leading to ergonomic problems and health and safety risks for staff.

Working hours

Call centres are traditionally designed to maximise productivity through controlling work activities and workflow. Market pressures, technological developments, customer expectations and global operations mean that call centres are operating longer hours and often working around the clock. Demands, call content and call volume may vary at different times, and shift arrangements can affect workloads - the number and type of calls received and the type of services provided. Some call centres report increased risks of violence and abuse during night shifts, with more verbal abuse or attacks on staff in call centres that do not have secure access or transport

Lack of control and flexibility in working time arrangements is a major issue in some call centres, and can lead to fatigue and stress-related ill health. Working time arrangements can have a major impact on workers' health and safety and on their personal lives. Action is needed to avoid risks and provide the flexibility needed for a healthy work/life balance and ensure adequate staffing levels.

Stress was a major issue in this strike by call centre workers in the UK in 1999

Work-related stress, harassment and abuse

Stress is a major concern for call centre workers. There are many potential sources of stress in call centres, shown in the table overleaf.

Sources of stress in call centres can be internal (due to working practices, workloads, working hours, systems of work, work environments and the behaviour or attitudes of colleagues or team leaders) or external (as a result of pressures from callers, e-contacts or intruders). Caller/contact abuse can be verbal or non-verbal, including threats, name-calling, offensive remarks or swearing, or racist or pornographic material sent over the Internet – sometimes referred to as e-violence or e-abuse. Other sources of stress include dealing with complex problems or difficult calls where the caller is confused, distressed, injured or disturbed, or where the call content involves emergency responses and safety-critical communications.

Change management is a major issue for call centres, given the rapid pace of change and the far-reaching nature of the restructuring

8 **HEALTH AND SAFETY** CONTINUED

Examples of sources of work-related stress in call centres

Excessive working hours/ shift systems	Work / Life balance problems	Contact overload	Information overload	Excessive workload / pace of work
Lack of control over workload / pace of work	lack of autonomy/ flexibility	Restrictions on movement / social contacts	Discrimination, bullying or harrassment	Lack of privacy / personal space / hot-desking
Job insecurity low pay	Lack of career opportunities	Abusive / difficult calls / contacts	Poor management / lack of support	Lack of rest breaks / screen breaks
Poor work environment	Ergonomic problems	Too much / too little variety	Repetitive calls / content of calls	Monitoring problems
Poor team relationships	Poor organisational culture	Competitive pressures	Lack of recognition and reward	Lack of involvement in decision-making
Lack of training	Unreliable data / inaccurate	Unreliable / faulty ICT	Time constraints	Poor system design

taking place in the services, technologies and workforce involved. Poor change management can lead to increased stresses for workers and managers alike, and can interfere with service quality and delivery.

Stress prevention in call centres means addressing the causes at source, assessing the risks and organising work and work environments in ways that avoid both physical and psychosocial risks to staff.

Examples of what employers can do

Evidence gathered in the TOSCA studies and elsewhere suggests that involving workers and their representatives in decisions affecting their working lives, their health and their safety at work (including the way their work is organised and carried out) can help to solve some of the problems and prevent future risks in the interests of all concerned. Consultation on health and safety is fundamental to good employment practice.

Risk assessment is essential if risks are to be avoided. Creating a positive health and safety culture is another vital step towards creating healthy call centres. This requires commitment from the top, and visible commitment to implementation by managers and team leaders.

When preventative measures are taken, they need to be monitored to ensure that they are working effectively. Proposed changes should be assessed for any health and safety risks, in consultation with staff, before the decision is taken to go ahead with them. Good employment practice means getting things right at the planning or design stage. This prevents risks and is generally far less costly than trying to deal with problems – and health effects – afterwards. Employers can gain valuable information about problem areas in call centres by listening to what their workers have to say about the job and how it is affecting them.

They can also
- ensure that all workstations are ergonomically sound and suited to their users' needs and that room temperature and other environmental features meet recommended standards
- provide all employees (including temporary staff and homeworkers) with clear information and appropriate instruction and training in safe working practices, reporting procedures, what to do in an emergency, the risks of the job and how to prevent them. This includes instruction on how to adjust the workstation to ensure a correct working position and avoid risks from display screen equipment.
- carry out regular evaluations of health and safety training to make sure it is effective and keeps abreast of any changes.
- ensure that breaks are taken and working time arrangements and breaks are both adequate and flexible
- develop health and safety policies covering issues such as stress and repetitive strain injury prevention, workstation design and

layout, performance monitoring systems, dealing with difficult or abusive calls, preventing bullying, harassment and violence at work as well as procedures for consulting with staff and their representatives
- allocate responsibility for managing health and safety at every level of the organisation, and ensure that managers and team leaders have the training to meet these responsibilities

EXAMPLE

A large insurance company worked together with the union to develop health and safety training for home-based call handlers and other teleworkers. The aim was to ensure that home-based workers had safe and healthy workstations and work environments, were competent to carry out self-assessments of their workstations and working practices, and knew how to work safely and without risks to health. They set up a small joint project team which was responsible for developing the training content and methodology for conducting pilot studies, evaluating the outcomes and reporting back to the joint union/management health and safety committee. Individual home-based employees were involved in the pilots, trialling the materials and providing feedback about any problems encountered. Once evaluated, the training was rolled out company-wide, with appropriate policies and procedures in place to ensure that they were monitored and reviewed at regular intervals.

Examples of what trade unions can do:

Unions can play an important part in influencing and monitoring health and safety. For instance they can:
- make sure that call centres either have their own joint union / employer health and

8   **HEALTH AND SAFETY** CONTINUED

safety committees or have management and union representatives on the employer's main health and safety committee (or both)

■ elect health and safety representatives to cover all call centre staff and locations and all operating hours or shifts

■ produce union guidance and advice on preventing risks at work, especially preventing occupational stress and musculo-skeletal disorders, and working safely with display screen equipment

■ conduct surveys of call centre workers to find out what their health and safety concerns and experiences are, and what action they want the union to take on their behalf

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UNISON charter to tackle call centre stresses

Three quarters of Scotland's call centre workers say they are stressed at work, according to a survey. Public services union UNISON said that almost two thirds of its members working in the industry have suffered pain in their hands, wrists or back. More than 80 per cent of the 500 people surveyed also said that background noise levels made listening and speaking a strain. A UNISON 'Raising the standard' call centre charter outlines key union priorities, including proper training, decent health and safety standards and positive work-life balance. The survey found 61 per cent of those questioned had experienced pain in their hands, wrists, and upper arms or back; 75 per cent said they felt stressed at work; and 66 per cent said that monitoring affected their stress levels.

Source: TUC Risks, 15 June 2002

EXAMPLE

The Belgian trade union FGTB has developed a course to train safety representatives in concrete ways of measuring stress at work. It has also produced a series of publications on health and safety in call centres covering:

■ harassment at work

■ stress at work

■ musculo-skeletal problems related to use of machinery

■ repetitive strain injuries

■ the protection of privacy at work

In some cases, trade unions have developed broad-reaching strategies for improving employment conditions in call centres. They include campaigning activities, conducting surveys and working with employers, trade associations and government agencies to promote good employment and health and safety practice. They also include working with training providers to promote improvements in training and develop appropriate standards for call centre qualifications, producing trade union guidance, developing new ways of involving members in union activities, and producing model agreements and policies for employment of particular groups within the workforce such as disabled workers, homeworkers or working parents.
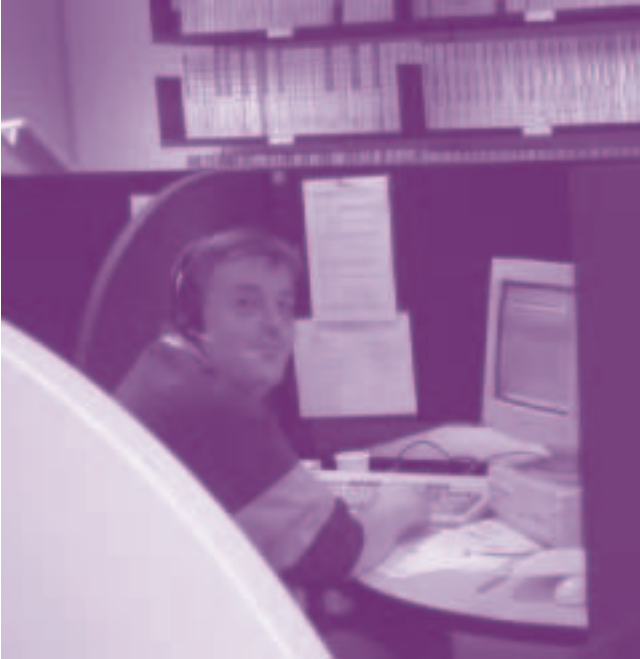
EXAMPLE

In the Merseyside area of North West England, unions have formed a partnership with employers, health and safety inspectors, training providers and recruitment professionals to develop new ways of improving health and safety and working conditions for call centre workers. This came about after a small informal group of concerned people started to meet to discuss how they could address the many problems being reported in call centres in the area. This led to a major conference in the region, attended by some 150 people including key call centre employers. There was general agreement and support for an innovative project to develop ways of improving health and safety standards and training in call centres, and a broad-based formal partnership steering group was set up to oversee and manage the project, with the help of government funding. The Merseyside Partnership Project is now underway, and aims to produce models of good practice in training and health and safety that will contribute to improvements that will benefit all those involved, and which will eventually be rolled out to other areas of the country following evaluation. Over 200 call centres are involved actively in this initiative.

9 Equal opportunities and workplace culture

This section looks at some aspects of equal opportunities in call centres. It covers:

- the legal position
- equal opportunities policies and procedures
- preventing harassment and discrimination at work
- maternity protection
- paternity leave and parental leave
- child care
- work-life balance and working time issues
- training and development and equal opportunities
- disability at work
- respecting cultural diversity

>> Introduction

Every employee has a right to be treated fairly at work, and equality of opportunity is an essential part of good employment and good management practice. It removes barriers to employment and career development opportunities and enables employees to develop their own potential as well as enabling their employers to fully utilise the skills and capabilities of the whole workforce.

Good equal opportunities practice also makes good business sense for call centre employers operating within a diverse European or global market. The more diverse the workforce, the greater the ability to understand and respond to customers' needs.

>> The legal position

Equality laws vary from one country to another in Europe, both inside and outside the EU. Some countries focus mainly or exclusively on sex equality and maternity protection, others cover a wider range of issues, including laws and/or statutory Codes of Practice aimed at preventing discrimination based on age, disability, ethnic or national origin, family or marital status, language group, race, religion and sexual orientation.

In the EU, European Directives cover equal pay and sex discrimination, maternity rights, part-time workers' rights and parental leave entitlements. There are also European Codes of Practice on Dignity at Work (primarily concerned with sexual harassment) and equal pay.

>> Equal opportunities policies and procedures

It is good practice to develop formal equal opportunities policies and procedures. These should cover all aspects of the employment relationship, including recruitment and selection procedures, terms and conditions of employment, pay systems and bonus schemes, working practices, training and development, promotion and transfer, leave arrangements and (where applicable) pensions, retirement age, redundancy selection and termination of employment.

Equal opportunities policies in call centre employment are also linked to equality issues in service delivery. In call centres, the callers and their telephone or e-mail communications can also be opportunities for discrimination and harassment or other forms of electronic abuse.

Examples of good practice:

It is good practice to set out the employer's commitment to the principles of equal opportunities at work, with a clear commitment to action to prevent unfair discrimination, harassment or discriminatory abuse, including disciplinary action.

■ There should be clear procedures for handling any complaints about discrimination (including discrimination or abuse from callers) and for protecting complainants or others from victimisation or harassment

■ There should be arrangements for training managers and staff in how to prevent discrimination and promote equality at work

■ Policies should make it clear that all service users should be treated with equal respect and that discriminatory treatment of callers or customers is against company policy.

■ Where applicable, performance standards and monitoring criteria should be checked to avoid bias or discriminatory criteria.

■ It is good practice to offer a range of alternative ways of making contact with call centres, to provide access points for people with sensory disabilities. These may include text-based telephones, videophones or accessible video booths, and accessible e-mail and web communications .

■ Policies and procedures should be made known to all staff, customers and clients. It is good practice to include procedures to ensure that workers are not obliged to continue to handle calls from people who subject them to sexual or racial abuse. Workers should also have the right to refuse to handle e-contacts involving pornographic material or racist hate mail sent over the Internet.

■ Consideration should be given to installing organisational or technological filters that will protect workers from exposure to discrimination, harassment and abuse.

■ Jobs, workstations and equipment should be designed with the needs of disabled workers in mind.

■ It is good practice to develop these policies and procedures in consultation with workers and their representatives, and to develop an Equality Action Plan to help plan and prioritise action points.

■ The action should be monitored at regular intervals to check that the measures are working and also to find out where further action is needed. It is particularly important to have a profile of the workforce at every level and to monitor staff appointments, promotions, training and transfer decisions in order to find out whether any particular group(s) of workers are under-represented, and if so, what is causing the problem.

>> Maternity protection

Maternity protection covers expectant and nursing mothers and women who have recently given birth. It is good practice to improve on minimum legal provisions in call centre terms and conditions of employment and in collective agreements, and to apply best practice in this area – for example, by

■ extending minimum periods of maternity leave

■ improving maternity payments

■ reducing qualifying periods for maternity leave and pay

■ adjusting working hours and shift patterns for pregnant workers, especially in later stages of pregnancy

■ allowing women to return to work on 'graduated hours' or on a part-time basis (on request) after maternity leave

■ enabling women to continue breastfeeding when they return to work, and allowing them paid nursing breaks to breastfeed or express and store breast milk for later use

■ providing comparable pay and leave entitlements for parents if they are adopting a child and need to take leave for adoption purposes

9 **EQUAL OPPORTUNITIES AND WORKPLACE CULTURE** CONTINUED

Examples of good practice include:

- Encourage expectant and nursing mothers to discuss their work situation and any problems they may be experiencing at work as a result, and consult them about risk assessments and any temporary adjustments needed to their work, working hours, workloads, performance targets or work environments.
- Provide training for team leaders and managers about maternity protection and adjustments, and ensure that any consultation with expectant or nursing mothers is carried out sensitively and in private away from other team members.
- Employees' health reports and medical records should be treated in strict confidence and should only be disclosed with the written consent of the worker concerned
- Special attention should be paid to workloads, postural demands, fatigue, rest breaks and shift patterns for expectant and nursing mothers, welfare arrangements (ready access to toilets and fresh drinking water) and to ensuring that their work environments and rest areas are free from tobacco smoke.

Some call centre workers are not allowed to receive urgent telephone calls at work, even when this involves family illness or childcare problems. This can cause anxiety and stress and can make it much harder for workers to manage their work and family lives

EXAMPLE

A major utility company in Scotland has a comprehensive health promotion service for all staff including its call centre staff. Provisions include a fully staffed medical centre, occupational health and safety services, well woman screening and health promotion facilities for pregnant workers. Individual risk assessments are carried out for expectant and new mothers, breaks are allowed for breastfeeding with hygienic facilities for expressing and storing breast milk on site. Women can get confidential advice about work and pregnancy from qualified health centre staff. The call centre and other areas are smoke-free, and there is a wide selection of healthy foods available in the canteens.

If necessary, working hours are adjusted during pregnancy to prevent fatigue and stress, and there is a company-wide agreement providing paid maternity leave and extended leave, with the option of returning to work on reduced hour or different shift patterns if requested. The agreement covers all the Group's call centres in the UK.

>> Parental and caring responsibilities

In EU member states, the Parental Leave Directive applies for workers with family responsibilities. This covers working parents' rights to leave for parental responsibilities and emergencies.

Examples of good practice include:

- Call centre terms and conditions of employment and collective agreements should include parental leave rights.
- It is good practice to improve on the basic entitlement to unpaid leave by providing a certain amount of paid parental leave
- ensure that 'expectant fathers' can take paid paternity leave to attend the birth and

be available to support the mother or care for other children in the period around the time of the birth

- ■ ensure that all parental rights apply equally to adoptive parents
- ■ allow additional leave on compassionate grounds where there are complications of childbirth or in the event of premature delivery, still birth or miscarriage
- ■ allow flexibility in leave arrangements and shift work for other types of caring responsibilities, for example, for elder care and care of disabled dependents.
- ■ Ensure that it is possible for workers to be contacted by telephone without delay in emergencies whilst on duty

EXAMPLE

In Belgium, as a result of pressure from the trade unions, parental leave and paternity leave provisions were improved, both in terms of increased pay and an extension of the leave period to give fathers more opportunity to take on caring responsibilities. According to the most recent statistics, this has been successful, leading to an increase in take-up.

>> Child care

Some call centres have recognised the need for additional childcare provisions for their staff, either in the form of a subsidised workplace nursery or in the form of childcare allowances to help pay for nursery care near to the worker's home. This helps to attract and retain workers.

In most countries, however, trade unions believe that the ideal situation is one in which community-based childcare facilities are provided for all who require them.

EXAMPLE

In Belgium, the Social Partners have set up a fund, in the context of a national and interprofessional agreement, representing 0.5% of total salaries. This fund is earmarked for setting up childcare projects, including projects that care for the children of working parents when they are sick and pre- and after-school provision

Examples of good practice include:
- ■ Consider providing and/or subsidising childcare facilities at or near the workplace
- ■ Provide child-care allowances for parents who wish to find their own childcare
- ■ Make financial contributions to local after-school play schemes
- ■ Plan childcare facilities and appoint childcare staff / providers in consultation with workers or working parents' groups
- ■ Nursery / crèche operating hours should be sufficiently flexible to meet the needs of shift workers in call centres
- ■ Include worker representatives (or working parents) on the management group
- ■ Ensure high quality childcare provision by using qualified professional nursery staff and meeting appropriate professional standards
- ■ Charges for childcare facilities, where they apply, should be kept as low as possible to make sure that call centre workers can afford them

EXAMPLE

One UK health service call centre has a nursery on site as well as a canteen and an attractive rest area separated from the workstations.

9 **EQUAL OPPORTUNITIES AND WORKPLACE CULTURE** CONTINUED

>> Work-life balance

Call centres often rely heavily on women workers (the majority of call centre workers in Europe are women). Many women have family responsibilities that can make it hard to balance work and personal life when working in call centres, especially if they operate shift systems. This can apply to men too. These difficulties can exist even if the call centre worker is based at home in a virtual call centre, because family members and caring responsibilities do not vanish when a caller is on the line.

Working time arrangements have an important influence on equal opportunities in call centre work, wherever it takes place. It is important that workers can predict and manage their working hours so that they can plan their personal lives and any arrangements they have to make for children, the elderly or other dependants. A positive work-life balance is needed, with recognition that workers have a right to a planned personal life. This helps to reduce stress levels and improves morale.

Examples of good practice include:
- It is good practice to consult workers about their working time arrangements and to try to accommodate their preferences, especially if they have caring responsibilities (including care for elderly or disabled family members).
- Working parents should not be obliged to work compulsory or short-notice overtime.
- Allow reasonable flexibility and opportunities for voluntary shift swaps to enable people to meet their family or caring responsibilities.

EXAMPLE

With financial support from a government-funded initiative, a large outsourced call centre and a trade union set up a partnership training programme for the call centre which aimed, among other things, to develop jointly agreed agendas which balanced business and social needs, and to use the training approach as a means to identify and comprehend business and social needs at the company. Using a learning approach, they then held a series of workshops on specific issues. One of these groups was asked to develop and refine recommendations to increase flexibility at the workplace, with the following aims:
- Achieving a more flexible workforce through mutual agreement
- Balancing the needs of the business with the social needs of individuals
- Increasing staff satisfaction by focussing on work life balance
- Attracting and retaining the right people
- Matching staff to business needs

Using these aims for guidance, an interim agreement on flexible working patterns was agreed in one section. They looked at business needs and staff were counselled on a range of options and were also given the chance of suggesting their own variations. This was followed by wider consultation using a range of options developed by the working group. In addition there have been improvements in parental leave and a new agreement for home-based workers to help improve work life balance.

The company found that, given a range of flexible options, staff were more willing to be flexible than before. The union found that the changes were seen as a big improvement by the members. 'The idea of matching social and business needs… has appeared in all sorts of issues and is quickly becoming the "culture", according to the union convenor.

>> Preventing harassment and discrimination at work

Care is needed to prevent harassment and discrimination in call centre work – including harassment or stalking by callers. Women and workers with distinctive accents may be particularly vulnerable to these forms of abuse. Telephone harassment and electronic stalking can be a feature of some call centre work, and some call centre workers have experienced physical assault, sexual or racial harassment and stalking when leaving isolated call centre buildings at night or in the early hours of the morning.

Examples of good practice include:
- a clear procedure for reporting incidents of harassment, supporting and protecting the workers concerned, and preventing recurrences.
- Ensuring that workers' personal whereabouts and contact details are withheld from customers and clients, and that their privacy is respected at all times.
- It is good practice not to require workers to give their family names when greeting callers or respondents.

>> Disability at work

Call centre work can provide significant employment opportunities for workers with various kinds of disabilities, but the way the work or workplace is organised may also create barriers to their employment and training. It is important to avoid making discriminatory assumptions about what a disabled worker can or cannot do, and to consult them (and if necessary their advisers or representatives) about any particular needs they have for aids, adaptations or adjustments. These may involve minor changes to the workstation or technologies involved, or relocation to a more suitable work environment, or adjustments of working times. In principle, provision for disabled workers should be made at the employer's expense, but in some countries additional funding may be available from government or other sources to help meet the costs of any changes involved.

Depending on the nature of their disability, disabled workers may require adjustments to be made to the work environment or the way their work is done in order to maximise their potential. Some disabled workers may opt to work from home because of mobility or travelling problems, but networking arrangements and the growth of virtual call centres are starting to make such arrangements increasingly possible.

Examples of good practice include:
- Include disability issues within company equal opportunities policies and training and train managers and team leaders in disability equality issues
- Carry out a survey of the workplace in consultation with disabled employees or specialist advisers to identify any barriers to employment for disabled call centre workers
- Check that recruitment procedures do not create barriers for disabled applicants – conduct interviews and pre-employment assessments at accessible venues, inform applicants about access arrangements, and consult them about any special requirements they may have.
- Inform job applicants of the company's positive attitude to employment of disabled people
- Consult disabled workers and their advisers / representatives about their needs and preferences
- Ensure that disabled workers, whether based at home or in a call centre building, can access team leaders, training facilities and team meetings
- Avoid discrimination in pay rates and performance monitoring systems – allow time for any necessary adjustments to workstations or for different technologies in use

9 EQUAL OPPORTUNITIES AND WORKPLACE CULTURE CONTINUED

- Allow flexibility in working time and shift arrangements
- Consider home-based work opportunities
- Take account of relevant standards and best practice in software design and website design

EXAMPLE

The Portugal-based THINK project, with initial financial support from the European Commission, trained disabled people to work from home providing outsourced technical support help line services to major companies. THINK has created employment for 240 disabled teleworkers at a European level: 60 in Portugal, 60 in Spain, 60 in Italy, 20 in Scotland and 40 in Greece. The main objective of the project is to integrate disabled workers into the labour market, through training, supplying the necessary infrastructure, support and a constant flow of work. The scheme has proved highly successful, both socially and financially, and now includes major clients such as Microsoft. The THINK model is currently being extended to the Baltic States.

EXAMPLE

Disability can be a barrier to work in nursing, but the UK on-line health advice and referral service is keen to recruit disabled nurses who might otherwise be unable to utilise their professional nursing skills and experience. Some 17% of call centre staff in the health service have disabilities, many resulting from manual handling injuries. To facilitate their employment, call centres have adjusted working hours and shift arrangements where necessary and have provided accessible workplaces, specially designed seating, communications aids and adaptations to workstations. They have also conducted individual risk assessments in consultation with disabled people to ensure that the workplace is not a barrier to their employment.

EXAMPLE

The collective agreement covering the Florence-based Answers Company – the first example of a virtual call centre in Italy – includes special provisions for 'atypical workers' including people with disabilities and women with childcare responsibilities.

EXAMPLE

A disability organisation in the Netherlands, HTA, has set up a skills register and a call centre specifically to create employment for visually impaired people.

EXAMPLE

In Belgium, a non-profit organisation, Fabioladorp, has set up an organisation called ACG which provides sheltered employment for people suffering from a mental, physical, sensory or psychological handicap. This now includes call centre work.

>> Respecting cultural diversity

All European workplaces are becoming more culturally diverse, but perhaps none are more so than call centres. The need to cater to customers in many language groups, often across national borders, has led to the development of Pan-European call centres staffed by workers of many nationalities. In addition, as the populations of European countries become more ethnically diverse, there is a need to cater for minority languages within, as well as between, national markets.

This results in a situation where many call centres have staff working alongside each other of different races and nationalities and with different religions and customs.

In addition to ensuring that recruitment and promotion policies do not discriminate on the grounds of race, nationality or religion, and

that policies are in place to prevent racial harassment, it is also good practice to ensure that the working environment is one in which all cultures are treated with respect.

Examples of good practice include:

- Adjusting leave arrangements to enable staff to observe their own religious or national festivals
- Allowing staff to 'carry over' holiday entitlements from one year to the next in order to make occasional long visits to their remote countries of origin
- Ensuring that canteen food and snacks allow for all dietary needs
- Avoiding the display of images which may be regarded as offensive or blasphemous by any group
- Ensuring that managers and team leaders are given training to sensitise them to issues relating to cultural diversity and the enforcement of equal opportunities codes and procedures.

EXAMPLE

In one large call centre in the telecommunications sector in the North of England dealing with operator assistance and emergency calls, 65% of the workforce is of Asian Muslim origin. On the initiative of the trade union, in order to cater to their needs, a number of adjustments were made to the company's normal practices:

- Break times were adjusted to fit in with prayer times and a non-denominational prayer room was established.
- Rules which prevented operators from eating at their desk were relaxed to allow them to break their fast at the appropriate time during Ramadan
- Holiday rules were changed to make it possible to accumulate the 40 days required to make a pilgrimage to Mecca
- Call volumes are reduced during Eid, the Muslim festival, but, conversely, during the Christmas period, extra calls are diverted from other call centres where the workforce is predominately Christian.

The result is a win-win situation with improved productivity and staff retention and increased flexibility in the management of the flow of calls.

10 Pay

This section covers:
- call centre pay systems
- contractual issues and pay
- working hours and pay
- job content and pay
- effects of location and market conditions
- sectoral issues
- pay equity
- Collective Agreements

>> Introduction

Fair and equitable pay systems are fundamental to good employment practice. In the EU, 'pay' means all pay and benefits, including fringe benefits.

Call centre pay is not just about hourly wage rates but also about the full package of benefits that goes with the job. Pay systems in call centres vary widely. Some call centres only pay minimum rates of pay, with no enhancements or fringe benefits. Others provide a range of pay and benefits that provide an improved package for their staff.

The factors that affect call centre pay include:
- how pay is calculated (e.g. basic hourly or weekly rates, individual or team performance targets and performance-related pay, and any premia paid for shifts, overtime or on-call or emergency duties)
- the type of contracts involved
- working time arrangements and hours of work
- the type of work and job responsibilities and competencies involved
- length of time in the job (e.g. training or probationary periods, incremental pay or grading schemes)
- the location of the call centre and market conditions
- sectoral issues

>> How pay is calculated

Pay systems differ considerably from one call centre to another. Some rely on individual contracts and have no system in place at all. Others have systems that apply to all workers, or to specific categories of staff. Some have collective agreements, either negotiated directly with the trade unions or worker representatives, or in some cases inherited from a previous business (as in recently privatised public services and utilities, or where companies have merged or been taken over). The fast-changing nature of call centre developments means that the nature of the work and the demands on staff may be changing faster than the original pay systems. Pay systems may include one or more of the following elements:
- basic hourly rates
- overtime premia
- shift premia
- unsociable hours / weekend premia
- emergency duty payments
- performance-related pay (see below) and/or bonus payments
- fringe benefits such as pensions, sick pay and holiday pay
- maternity pay and/or paid parental leave
- incremental grading

Examples of good practice:
A prerequisite for a fair pay policy involves the development of an objective method or instrument to evaluate each function (rather than the individual employee who carries it out) based on the principles of equity, equality and transparency and with the aim of ensuring a stable basic salary which can be relied on. Good practice involves
- making each element of the pay system transparent so that everyone can see how their pay has been calculated

- ensuring that pay systems take account of the full range of benefits and entitlements that can be offered
- ensuring that systems are fairly and consistently applied across all groups of staff
- ensuring that any criteria used for calculating pay and benefits entitlements are as objective as possible and are free from bias, and are related to the actual requirements of the job and not the individual characteristics of the postholder or the individual preferences or attitudes of the manager or team leader.

EXAMPLE

In the example of a call centre in Italy, a national collective contract framework gives a detailed description of the professional post, specifying responsibilities and duties, work hours, overtime and pay.

>> Contracts

Even when people are doing the same work, the type of contracts they have (e.g. permanent, temporary, casual or homeworking) can affect their pay.

Permanent staff may have a better overall package of pay and benefits than others, with access to holiday and sick leave entitlements or pensions that other staff do not receive. But if the call centre has a system of individual contracts (rather than a common system for all permanent workers) there may be differences in individual hourly pay rates and benefits for different workers. This can be seen as unfair and divisive and may be in breach of equal pay legislation. Likewise, if part-timers on permanent contracts are treated less favourably than full-timers, this may also involve unlawful discrimination.

Home-based call handlers may not be included in the pay system covering the main call centre if there are two different categories of staff

(call centre based and home-based). This can lead to demotivation and undervaluing of their work, and may discriminate against women and disabled workers.

Temporary staff may be excluded from service-related entitlements, so that even if they get the same basic hourly or weekly rates, the whole package of benefits is less than for their permanent colleagues. This can be seen as unfair in situations where temporary staff actually work for long periods and have the same continuity of employment as their permanent colleagues, even though this is not reflected in their contractual status. Agency staff may be paid higher or lower rates, depending on the agency and the arrangements made. In call centres that are heavily dependent on agency workers, this too can lead to resentment.

Casual staff may include workers who are employed on so-called 'zero-hours' contracts or on-call arrangements who can be called in to work for very short periods without notice, but have no guarantee of work or pay while they are on standby. This can mean that their work and wage levels are highly unpredictable, and their transport costs (and childcare costs, where applicable) can be disproportionate to the hours they are paid for. They do not normally receive shift premia or unsociable hours payments.

Some casual or on-call staff work for the same company in another capacity and in effect have two jobs with the same employer, but do not get overtime for the extra hours they work in the call centre. Examples include large supermarkets that use their own shop workers or cashiers to fill gaps in their call centres after hours. These extra hours are not counted as their basic weekly hours, so their fringe benefits are still calculated on their basic hours in the shop and not their total hours including the call centre. For part-timers this can make a significant difference to their entitlements to holiday and sick pay and to maternity pay or pensions.

10 **PAY** CONTINUED

Examples of good practice:
- Ensuring that any qualifying periods for entitlements to benefits such as improved sick pay or holiday pay are related to actual length of service, not contract type
- Including home-based call handlers in any agreements, pay systems or grading schemes that apply to call centre based staff, and agreeing common pay and benefits systems for all workers
- ensuring that on-call staff receive payment for a guaranteed minimum number of paid hours for any period of on-call hours worked, and/or paying on-call workers a guaranteed 'standby' payment for any periods when they are being asked to be on standby for casual work or emergency duties
- recognising additional hours put in by staff who do call centre duties in addition to another job for the same employer
- avoiding discrimination against part-timers

EXAMPLE

After a successful ballot for union recognition at the company, an outsourced call centre provider worked jointly with the union to review the pay and pay progression systems in place. Following joint deliberations, with agreed goals to improve and clarify the system, recommendations were formulated, and an agreement was reached and implemented. This changed the situation from individual contracts and bonus payments to pay progression using new agreed competency assessments. The criteria for these assessments were jointly developed by the union and the employer. After the initial review, pay progression is reviewed for all eligible staff every six months. If successful, they receive a consolidated pay increase following review.

>> Working hours

Working hours (when people work, and for how long) can have a big effect on pay for call centre staff, depending on how pay systems reflect working time arrangements. Examples here include overtime, weekend and shift work, on-call and emergency service payments.

Examples of good practice:
- recognising and rewarding shift work, weekend working or unsociable hours and overtime working
- ensuring that performance-related pay systems and any bonus schemes in operation do not penalise people who are unable to work particular shifts or overtime (e.g. for family reasons)
- checking that performance monitoring systems are fair and appropriate and are consistently applied, allow enough time for rest and toilet breaks, workstation adjustments and recovery after stressful calls

EXAMPLE

Arrangements for emergency work at weekends and bank holidays in several large utility companies are voluntary and only involve a skeleton staff at night. People who decline to work at night are not penalised and their performance appraisal is not affected, but the unsocial hours are paid at enhanced rates and emergency duties are fairly distributed between those who volunteer to go on the emergency roster.

EXAMPLE

One large on-line shopping call centre has a minimum call-out payment for hourly-paid casual workers. Any periods actually worked are subject to a minimum call-out payment period of 4 hours even if the actual hours required are less than 4 hours.

EXAMPLE

At a UK bank's main call centre, the union and the employer have negotiated an agreement addressing concerns over flexible working arrangements. New recruits can indicate their preferred working hours, choosing either 15, 20, 25, 30 or 35 hours a week with a range of options for working patterns. Additional hours are paid at enhanced rates. This agreement gives both the employer and employees the flexibility they need, whilst ensuring that part-time working does not result in unlawful pay discrimination or unequal pay, and that additional hours or unsocial hours are recognised.

>> Job content

The type of work involved, and the skills and competencies required for this work, can also affect call centre pay rates. Not all call centre work is the same, even though work settings may appear similar. Differences in the demands made on staff may be reflected in their pay. Failure to recognise and reward the skills, experience and competencies required for the job, or the levels of responsibility involved, can lead to demoralisation and difficulties in retaining staff. It can also mean that pay systems are not fair or equitable.

Examples of good practice:
- recognising and rewarding the skills, experience and competencies required for the job and/or the levels of responsibility involved, through the introduction of appropriate grading or job evaluation schemes
- ensuring that job descriptions for all staff, and for team leaders and managers, are agreed and accurately reflect the responsibilities, tasks and competencies required

EXAMPLE

Retention problems in an on-line health advice call centre affecting professionally qualified and experienced nurse advisors were addressed following discussion with the nursing unions involved. It was agreed that to properly recognise and reward the competencies and experience required for the job, the posts should be regraded to match the professional nursing grades and pay scales. Following implementation of these changes, turnover at the call centre was far lower than before.

>> Call centre location and market conditions

Call centre locations can affect wage levels depending on local labour market conditions. This is closely linked to issues about competition for staff and/or skills in the local labour market, and to pay rates for any specialist occupational groups involved in staffing services.

Where call centres in different locations have been networked together company-wide to form a single 'virtual call centre', the work may be shared between different centres or overflow may be diverted to a different location. If these call centres have different pay systems, this can mean that the same work is being paid differently in different places from one day to another. This can be seen as unfair and divisive.

Competition (e.g. whether other call centres are competing for call centre contracts or staff) can affect call centre pay at local, regional or national levels. Competition exists in the local labour market but also in the call centre services market. Competition for staff can push pay rates up, but competition for call centre service contracts can have the opposite effect, especially where service quality or skills are not a priority. Competitive pressures within a particular sector (for example, to reduce overall

10 PAY CONTINUED

costs right across the business) can also affect pay in call centres, but if competing call centres in the area are offering better pay and conditions, call centre workers are likely to move to where they can earn more.

Examples of good practice:
- ensure that basic hourly rates and fringe benefits are attractive and consistently applied
- where diverse call centres are being integrated into virtual centres, consider how best to harmonise terms and conditions so that the system treats everyone fairly
- consider how the pay package and pay system can be improved to attract and retain more staff, improve morale and ensure fair and equitable treatment, especially where recruitment and retention is a problem

EXAMPLE

A major telecommunications company recently rationalised all its pay scales at the same time as restructuring its call centre operations. In order to ensure that similar work in different call centres was paid at comparable rates throughout the country, and that the company complied with equal pay legislation, a national pay agreement was reached with the union alongside wider restructuring. This rationalised all the pay scales, using agreed job descriptions and job evaluation criteria, so that pay grades were simplified and clarified. Any post holders whose pay rates were re-evaluated at a lower rate (due to restructuring) had their existing pay and pensions protected, and anyone whose job was graded at a higher rate received a pay rise. Although a performance-related bonus scheme operates in the call centres, this does not affect entitlements to basic pay, the rate for the job, and any negotiated pay settlements.

>> Sectoral issues

Sectoral issues can affect pay within particular sectors, especially where customer services and sales functions have been part of sectoral pay systems where established pay differentials, collective agreements or job evaluation schemes are in place.

Where new sites are set up in new locations, the links with the past or the sector served by the call centre may be broken. This is particularly likely where call centres are set up in new locations as separate business functions, or where they are outsourced to call centre service providers. In Italy, for instance, the existence of sector-level agreements may mean that when call centre work is outsourced, the workers are transferred to a sector with an inferior agreement.

Examples of good practice:
- Retaining 'inherited' pay systems if and when a call centre is set up or transferred, and maintaining existing terms and conditions of employment for staff who transfer from other jobs or other parts of the business to new call centre jobs

EXAMPLES

Collective agreements at sectoral level covering call centre workers operate in a number of European countries. Examples include:
- a specific sectoral agreement for the telemarketing sector in Spain
- sectoral agreements in Italy covering specific sectors including metal workers and telecommunications, banking and finance and the retail sector

>> Pay Equity and performance related pay

EU law requires employers not to discriminate unlawfully in their pay systems or the way they treat their employees. It is therefore very important that pay systems – and any performance monitoring systems or bonus schemes – do not result in discriminatory pay or conditions for call centre staff.

Opportunities for pay discrimination can occur in many areas, including:
- bias in performance-related pay, performance monitoring systems, monitoring criteria, appraisal or grading schemes
- less favourable treatment of part-timers or other particular groups
- use of individual contracts
- rewards that are not related to the actual requirements of the post and/or are open to bias and inconsistent treatment

Call centre workers report particular concerns about the potential effects of performance monitoring and appraisal systems on pay. Unions have also expressed concerns about the operation of certain types of bonus schemes, which have proved divisive in some situations.

Examples of good practice:
- conducting regular pay audits to ensure that pay systems are open and transparent, fair and equitable, and that they comply with the laws on equal pay and minimum or statutory wages
- introducing appropriate and equitable job evaluation or pay grading schemes to ensure that pay is determined by the nature of the work done by the postholder, and not by the postholder's individual characteristics or favouritism by supervisors
- ensuring that part-time workers are paid, on a pro-rata basis, the same rates of pay and benefits that would be paid to a full-timer in the same position

- checking to make sure that particular groups such as women, ethnic minorities or disabled workers do not suffer from pay discrimination

>> Collective agreements

It is good practice to consult workers about their pay and conditions, and to do so collectively through established bargaining, works councils or partnership arrangements. Agreements can differ in their form and scope, with major variations according to the different national traditions in Europe and between sectors. Some call centres are covered by wider company agreements covering all employees (not just call centre staff); others operate at a sectoral level, and are negotiated with the employers' associations and relevant workers' representatives. Some are negotiated nationally; while some only apply to the call centre itself. Some also apply to outsourced services, with specific clauses inserted in the contract with the supplier.

There are also major differences between countries in the scope of the collective agreement, and in which features are negotiated at a national level, which at a sectoral level and which at a workplace level.

The scope of collective agreements may also affect which workers are covered even within a single call centre. Some agreements do not cover team leaders or managers; others do not cover temporary staff, casual or on-call workers, or home-based call handlers. This can lead to divisions between different groups of staff.

Examples of good practice:
- in-house call centres are included in the collective agreements at company level, and/or are integrated into company-wide grading systems or job evaluation schemes

10 **PAY** CONTINUED

- call centre workers elect their own representatives to take part in pay negotiations, so that their interests and concerns are directly represented in any discussions and decision-making
- where there is restructuring or a change of company ownership, inherited pay systems are harmonised on the basis that the best practice prevails for each element of the pay package, and the principle of 'levelling up' rather than 'levelling down' is applied
- individual contracts and individual bonus payments are replaced by a straightforward grading scheme covering all staff that is jointly agreed between the employer and the union.

EXAMPLE

The Belgian trade unions are campaigning for analytical methods of classification to be applied to the analysis of functions across all sectors and enterprises in order to create an objective basis to evaluate and remunerate jobs.

The guiding principles are:
- Evaluation on the basis of equity, equality and transparency
- Wages based on the function itself not how it is carried out or by whom
- A clear framework for communication of information, implementation and the resolution of disputes, which takes account of gender issues

EXAMPLE

As part of their 2000 pay agreement, the union and the employer, an outsourced call centre provider, conducted a joint review of both the pay structure and the process of pay progression, with the aim of achieving clarity and transparency of relevant pay and progression criteria. This was needed because the previous system had created anomalies affecting individuals or groups, and there were retention problems. A new pay and progression structure was agreed and introduced. This resulted in added benefits to the company with improved retention.

11 Industrial relations issues

This section covers:
- trade union membership, recruitment and organisation
- collective bargaining and representation

>> Introduction

One of the principles underlying fair employment and good industrial relations is recognition of the legitimate role of independent trade unions and the rights of trade union members. These include rights to:

- fair and free elections of trade union representatives
- full information and consultation
- individual representation
- collective bargaining
- health and safety representation
- respect for the privacy of trade union communications
- time off with pay and use of workplace facilities for trade union representatives so that they can recruit, consult and represent members, consult employers and seek information about relevant proposals, decisions or developments, undertake appropriate training, and attend necessary meetings
- consultation, involvement and participation in decision-making and policy development

>> Trade union membership, recruitment and organisation

Trade union membership and recognition agreements involving call centres are more commonly found in workplaces or organisations with a past history of trade union organisation before the call centre was established. Examples of this can be found in public services, public utilities, large-scale retail outlets, financial institutions and emergency services with a tradition of active trade union involvement.

Other examples include call centre operations that have been outsourced from organisations and service providers that have existing trade union members and collective agreements, or where company take-overs and mergers involve organisations with trade union agreements in place.

Despite some obstacles to trade union organisation and involvement, there are now many examples of positive industrial relations, Works Council representation and partnership working involving call centre employers and trade unions. These examples can be found not only in in-house call centres, but also in outsourced call centres, virtual call centres, amongst homeworkers and in employment agencies specialising in supplying call centre staff.

Obstacles to trade union recruitment and organisation include many of the same problems facing employers trying to recruit and retain call centre staff. People often do not stay long in the job, they may work irregular shift patterns or work part-time, and they may be difficult to contact at work (personal and non-work communications are often banned during working time in call centres). The high proportion of casual and temporary workers, coupled with the transient nature of call centre employment, means that it can be harder than elsewhere to recruit and retain members.

Another potential obstacle is the problem of finding time to speak to employees at work in private about joining the union – call centre workers are extremely closely supervised, and may have to give reasons for logging off the system even to have a short conversation with a union representative. Call centres are also generally open plan, with workers in full view of the supervisors at all times. Rest breaks and lunch breaks are taken in shifts and therefore it can be difficult to get everyone together in larger groups.

11 INDUSTRIAL RELATIONS ISSUES CONTINUED

However, call centre workers increasingly recognise the need to join unions and be represented by them. Some unions have conducted recruitment campaigns, leafleting employees as they leave work, publicising what unions have done for other call centre workers, and campaigning on specific issues. Concerns about pay and conditions, work-related stress, performance monitoring and health and safety are high on the list of reasons given for call centre workers joining unions.

Some trade unions have succeeded in negotiating arrangements giving them time to talk to new starters on induction courses about joining the trade union and what the union can offer, and/or including information about joining the union in the company's new employees' information pack. Others have recruited members by using agreed channels to circulate emails and newsletters and set up electronic bulletin boards or physical notice boards within the company.

EXAMPLE

In 2000 in the UK, finance union UNIFI and telecoms union CWU offered a joint 'portable union membership' to call centre workers switching between the two industries.

Under the 'Moving On' scheme, whose launch is pictured here, members are urged to make a seamless switch between the two unions, which will see no qualification period for benefits in their new union. The move was designed to counter the haemorrhaging of members suffered by all unions in the call centre industry where staff turnover rates can be as high as 80 per cent.

The unions also expressed the hope that the scheme would help overcome difficulties of union recruitment in a 'new economy' industry notorious for low pay, tough working conditions and short-term, part-time contracts. They recognised that many staff switch from telecoms to finance call centre work and that large numbers of union members are 'lost' to all unions in the process.

The scheme was subsequently extended to other unions, which are active in the call centre sector.

Forms of union organisation and representation and collective bargaining traditions vary in different countries. Each country has its own distinctive national laws and practices that govern the way that unions organise and the way that collective agreements and industrial relations are conducted. Agreements may be at a national, sectoral, company or workplace level. Unions typically negotiate with the employer in call centres. But in some cases, for example where there are links between the client organisation and an outsourced call centre, the same union may represent both groups of workers even though the employer is different. Here the main connection is the call centre contract rather than a shared employer.

Organising members and communicating with members in call centres can be more difficult than elsewhere because of the great variety of shift patterns in some larger call centres, the high turnover of staff, and the intensity of the workload. Keeping operators in membership when they move on to work in another call centre is another problem. However these obstacles can and have been overcome in many workplaces. Unions have started to work together to tackle problems and promote trade union membership in call centres, campaigning jointly in areas where more than one union is involved in organising call centre staff. Where employers are willing to co-operate with unions in the interests of good employment relations and effective working relationships, union density levels as high as 97% have been reported even in brand new call centres.

EXAMPLE

In Bulgaria, although the legal framework may in principle provide protection of workers in call centres, in many private firms the relationships between employers and employees are not legally set out, so the workers can find it hard to defend their employment rights. To resolve these problems CISB trade union has been developing a scheme under which an individual membership within their local

structures will be allowed. It is expected that many workers, including those in call centres, or teleworkers who need specific labour arrangements, may use this arrangement to obtain more effective representation from the trade unions.

Unions' approaches to recruitment and organisation include the implementation of a broad range of measures, some very creative and original, aimed at attracting workers to the union, especially young people and precarious workers. Communication and information are considered to be priority objectives. This is achieved through call centres and toll-free phone lines, particularly common in the UK, help centres in Italian Chambers of Commerce and the sponsorship of local sports and musical initiatives (Denmark and the UK). In the UK, the TUC has set up a training centre for union activists on recruitment methods ('Recruit a friend' campaign). In Germany militants who manage to recruit more than 10 new members are given CDs and other benefits as rewards. In Holland, union bodies exclusively targeted at young people or women have been set up.

The UK trades Union Congress (TUC) set up a free telephone help line for call centre workers for two weeks and received over a thousand calls of which 70% were from non-union workers. The most frequent complains concerned excessive surveillance (25% of calls), lack of breaks (15%), general health and safety (13%) and more specifically stress (8%).

Some of the calls detailed harsh conditions
- In one case a manager made staff sign a 'toilet book' to check how long they were spending away from their desks. He warned that the workers who spent the most time in the toilet would be forced to wear nappies/diapers.
- One caller had been forced to go into work to report sick in person rather than phoning; had to raise a hand for

permission to go to the toilet and was only allowed three seconds in between answering incoming calls.

- Another call centre worker told the hotline that he was disciplined for leaving a six-second gap between calls.

Prior to the hotline campaign the TUC issued a report on call centres entitled 'It's Your Call,' which documented other examples of inhumane treatment of call centre workers.

One example in the report was of a worker who fainted at his desk and then had the time it took him to be driven to hospital deducted from his wages. In another case, a health representative at a call centre was suspended for using the company's phone to contact the Health and Safety Executive about a gas problem.

The TUC was able to use such dramatic stories to get widespread publicity in the British media and disseminate information about the benefits of trade union membership for call centre workers

Information from UNI on-line Call Centre news

EXAMPLE

In Italy, the large confederated unions (CGIL, CISL and UIL) have set up specific union structures for the representation of atypical workers (temporary and parasubordinate) . By law these categories are technically autonomous but economically subordinate. The Italian unions are focusing their efforts on pressing for the introduction of an adequate legal framework capable of offering the normal legal certainties and fundamental social rights which are almost completely lacking for Italian parasubordinate workers.

EXAMPLE

In Scotland, public sector union UNISON conducted a survey of its call centre members and launched its six-point call centre charter, 'Raising the Standard' in June 2002 aimed at Scotland's 46,000 call centre workers. The six key principles that should apply when raising standards for call centre workers are:

- fair pay and conditions;
- a positive approach to work life balance;
- better job design;
- the opportunity to join a trade union;
- training and development; and
- health and safety at work.

Examples of good practice:

Good practice in this area means ensuring that all call centre workers, regardless of length of service – including temporary and part-time staff and homeworkers – have the right to:

- receive information about joining a trade union
- join a trade union
- be consulted and informed about decisions affecting their working lives
- communicate with other union members and representatives
- be represented in matters relating to their conduct or employment (including their health, safety and welfare at work).
- and that all members are able to take part in union activities without fear of victimisation or harassment.

>> Collective bargaining and individual representation

Collective agreements in call centres follow the same lines as many other workplaces, but in call centres it is particularly important that some key aspects of call centre employment (such as systems design, communications, training, technology, monitoring systems and change management) are included within the scope of consultative and bargaining arrangements. It is also important that agreements cover as many call centre staff as possible, so that particular groups such as homeworkers or temporary workers are included and have the same rights as their colleagues.

EXAMPLE

In France, worker representation bodies have been formed in many call centres; the unions have a say in the choice of delegates and there are combined health and safety committees where specified. In one case trade unionists are represented on the Board of Directors (under the provision of the 1982 Auroux law). All these structures put together help to encourage and stabilise relations between management and worker representatives. Both participatory (information and consultation) and negotiation measures are used. Negotiations between the social partners on the application of the law on the reduction of working hours to 35 a week are an example. Each call centre, through the negotiation mechanism, adopted specific measures for the application of the law. In some cases, the workers were asked to express their opinion about the options available. In one case a referendum was held on which arrangement to adopt: 35 or 32 hours a week; 34 hours in a four-day working week; or annual calculation of work hours.

EXAMPLE

Call centre activity in Spain is regulated by the Collective Agreement for Telemarketing. This agreement defines telemarketing as 'that which is done by telephone, by data transmissions, by applying digital technology or by any other electronic means that is aimed at the promotion, diffusion and sale of all types of products or services, carrying out or emission of personalized interviews, reception and classification of calls and contacts with clients in a multimedia surrounding, and the different customer services'. CCOO (the trade union), developed as its first objective the provision of a contractual framework that could regulate the basic conditions for call centre workers.

The first state collective agreement for companies in the Spanish telemarketing sector came into effect in 1999.The agreement defines the maximum duration of the annual work schedule and a standard working week of 39 hours. There is a system of professional classification and a clear explanation of the expected remuneration, the forms of contracting allowed, and the basic requirements for training, health and safety. This first collective agreement was a starting point to establish some minimum working conditions, after the establishment of a common framework and the creation of a union structure by means of elections for representation within the companies. Currently there are union representatives in the majority of companies in the sector, with about 700 elected union representatives, of whom 45% belong to CCOO. Negotiations for the Second Collective Agreement in the telemarketing sector started at the beginning of January 2001 and the Agreement was signed in November 2001.

12 **HEALTH AND SAFETY** CONTINUED

EXAMPLE

Unions are developing a high profile in many call centres in the UK across all sectors. Participatory approaches are linked to collective bargaining, with an increasing trend towards partnership agreements whereby the union is directly involved in company decision making, in consultation with its members. In one case, the unions were involved at all stages of the development of a new on-line health advice service. In another, a newly-recognised union developed a partnership training project with the employer. The agreement tackled key issues such as a policy on promoting dignity at work and combating race discrimination and harassment; the introduction of new pay systems and performance assessment criteria; a protocol for joint working arrangements; homeworking; work life balance; and flexible working.

In addition to collective representation, individual representation is also important. In monitored call centres, issues such as performance monitoring can be highly contentious and can give rise to real problems, especially in cases of actual or perceived unfairness, discrimination, bullying or inconsistency. Sickness absence monitoring, working time arrangements (including timing of breaks) and leave arrangements are also areas where individual representation is likely to be needed.

EXAMPLE

In Belgium the industrial relations system in one call centre company is divided into three levels according to the distribution of activity of this large company: national, regional and local. Between the group's headquarters and associated companies there are company councils, health and safety committees and other combined bodies involving the social partners.

Examples of good practice in individual representation include:

■ the right to be accompanied / represented in any disagreement arising from performance assessment, sickness absence monitoring procedures or grievance and disciplinary procedures, with appropriate rights of appeal
■ confidential procedures for reporting and investigating any complaints of discrimination, harassment, bullying or victimisation within the call centre, with rights of representation for the person making the complaint
■ appropriate procedures for handling issues concerning sensitive personal or health matters and ensuring confidential handling of related records allowing employees to be represented if they so wish.

Arrangements that facilitate trade union recruitment, representation and collective bargaining have often been beneficial to employers because they have resulted in many of the key concerns of call centre workers being more effectively communicated and addressed in the workplace. The outcomes in such cases have included improved productivity, reduced sickness absence, better working relationships, more harmonious industrial relations and reduced turnover of staff.

12 Conclusions

Progress in improving call centre employment conditions has been brought about by a combination of trade union activity and proactive approaches to employment by some of the more progressive employers involved.

In some cases other policy stakeholders, such as government organisations, the European Commission and NGOs have also played a part by funding research, training schemes or pilot projects, by organising conferences or workshops, by designing regional economic development strategies involving call centre employment and by a variety of other means

This has yielded benefits for employees and employers alike – and not only in the short-term.

The employment situation in call centres is changing fast – as is the sector's thinking about possible ways forward. Some of the more radical solutions have come from call handlers themselves (and their representatives) but they also come from employers, from joint union/management organisations and from other external social actors.

Much has been written about call centres, and they have often had a bad press in the past. They have been likened to 'information processing factories' or 'modern-day sweatshops'. The reality is that whilst some call centres live up to these stereotypes, there has also been progress towards a better model of employment practice in call centres. More and more call centres are attempting to break the mould and find radical and positive solutions to the 'battery hen' images of call handlers 'chained' to cage-like workstations by their headphones.

There is little doubt that changes are needed. Failure to break the pattern of low pay, lack of flexibility, intensive workloads, unrealistic performance targets, constant monitoring,

poor job design and unhealthy working conditions will perpetuate the problem and will store up serious health and safety risks for the future.

A fundamental shift in corporate values in some call centres may help to ensure that short-term gains involving meeting targets or securing contracts are not outweighed by long-term losses involving sickness absence, high turnover, low productivity or poor service delivery.

We hope that the work of the TOSCA project has shown that progress is being made, that there are many alternatives to the old negative call centre images and practices, and that these alternatives are much better news for call centre employers and workers alike.

Current trends and developments in call centres and information processing suggest that call centre employment is likely to continue to change, with further growth in the use of call centre services and a wider range of services being provided. The use of e-mail and web-enabled technology in call centres may mean additional tasks for call centre staff, involving several different forms of contact. This will have implications for job content and further implications for workers' health and safety at work. Future developments will need to be accompanied by changes in job design, workload distribution and training content to meet new demands and training needs.

Trade unions have a major part to play in shaping the call centres of the future, and making sure that future changes benefit the people who work in them. Working together across Europe, sharing information and examples of good practice, learning from the past, and bringing other call centres up to the standards of the best can all help to make these changes positive.

12   **CONCLUSIONS** CONTINUED

Trade unions will need to proceed on several different fronts simultaneously to achieve these broad goals.

At the most basic level, they will need to continue to promote their traditional values and bargaining agendas, developed in other types of employment, and transfer them to the new working environment of the call centre. This includes demands for such things as higher salary levels, more continuity and security in working agreements, combating stress, ensuring more worker control of work rhythms, improving workstation ergonomics, working hours and holidays and defending workers' privacy.

But these traditional roles are not enough in themselves.

Because of the nature of call centre work, achieving such aims is by no means easy. In many call centre environments a vicious circle has evolved: call centre work is highly structured and does not permit workers to acquire additional skills; companies are not willing to invest in the individual worker; agents are given the minimum training to carry out their tasks; career opportunities are rare; workers see their only chance for mobility as being 'through the door'; this creates high turnover which in turn encourages employers to keep the tasks simple and highly structured and not to invest in training and so the spiral continues. Breaking such patterns is a major challenge for both unions and employers.

In order to tackle the special problems of call centre employment, trade unions will also need to add new approaches to their traditional roles and many are already taking active steps to do so.

These include supplementing their traditional negotiating and collective role with more personalised and specialised individual services, revision of the relationships between federations and developing means of co-operating more closely across sectoral and national boundaries, and becoming much more responsive to the needs of women workers.

Trade unions will also need to campaign at a broader political level: for a legislative environment which does not obstruct, but favours a trade union presence in the workplace; and for international harmonisation of social protection and labour market regulation so that the improvement of conditions in one country does not simply lead to employers relocating call centres across national borders where wages are lower or workers less well protected.

Taken together, these steps could go a long way towards bringing about improved conditions of employment in call centres.

It must, however, be recognised that for many workers call centres may continue to be a transient form of employment, perhaps taken up as temporary work whilst studying or to fit in with some other life transition, such as a period spent looking after young children or caring for a sick parent.

In such cases it is extremely important that measure are taken to ensure that during such periods call centre workers still have access to learning opportunities which will give them genuinely transferable skills that they can take with them to other sectors of the economy or use in their capacities as citizens of the information society.

In order to achieve this, there will be a need for co-operation between a range of different policy stakeholders to construct and certify skills that can be used across the board for a range of different ICT-based jobs, and, more broadly, to create the social infrastructure that can make life-long learning a reality for all.