

Please note that this is only a sample of the checklist.

OnTrac Star Certification: Week-wise Action Items [8 weeks for implementation]

Name Of Participant: _____

Name Of Participant's Manager: _____

Date of completion of OnTrac course: _____

Note: Manager can sign off only when the participant has completed all the activities in a top

WEEK 1

TOPICS	Activity Number	ACTIVITIES TO IMPLEMENT	TO SUBMIT	Manager Sign Off
Team Leader jobs	1	.....	
	2	.....	
	3	Classify the jobs of a team leader on daily, weekly & monthly basis. Create a daily check list to prioritize your task	Excel format with job classification	
BPO	4	Explain the following to your team. Captive center+Blended Center+B to B & B 2 C Center= Profit & Cost Center.	Sample test papers [test to have 20 objective type questions, each carrying 1 mark] & team members-wise scores	
	5	Explain the uniquenesses of back office or BPO processes to your team members.		
	6	Explain the following to your team. 1). The various processes/accounts/programs in your company & who heads them. 2). The various employee benefits for team members. 3). The various Internal Departments in your company & who heads them.		
	7	.....	
Profiling	8	.....	

People Development	9	.....	
WEEK 2				
Coaching	10	Incorporate COACHING as part of your weekly schedule. At the end of every week, add the total time spent on coaching and track it. You should attempt to spend 30 to 60 minutes per team member per week on coaching. Create a format with the name of a team member to coach; date of coaching; done Y or N; total time spent & action	Submit format with data for 1 week.	
Motivational Techniques	11	Identify where in Maslow's hierarchy is each of your team members. Identify likely motivators for each team member on the various levels. team member wise format to create. Profiling exercise will	NA	
	12	Recognition exercise to be done at the end of every month (list names of the team members in your team & against their names put down when they were last recognized and for what).	NA	
	13	.....	
	14	.....	
Incentive Management	15	.....	
WEEK 3				
	16	Work out possible growth/role options for tenured team members in your team using the SUCCESSION PLANNING TOOL as in the courseware.	Submit succession-planning format-include plans for all team members in your team. Submit plans for 2 team	

Team Management	17	Create an exhaustive list of EVENTS THAT DESERVE RECOGNITION. The list must have atleast 100 events. [for team members] + Also ask team members what they would like to get recognized for- get the, to give you a list. The 100 list should comprise of your ideas & team members.	Submit list.	
	18	.....	
	19	.....	
Metric Driven Approach	20	Invent a new metric for something or some problem that is currently not being mesured in your process or team. Also give suggestions on how this metric can be measured.	Develop a new metric for the following: 1) Health of an team member. 2) Supervisor effectiveness in people development. 3) Any other relevant to your process. Submit for all three metrics in the following format: Metric + Report format to capture metric.	
	21	Educate the team on importance of metrics. This can be done by using examples such as: I need to reward the most consistent team member for the month of XYJ. How should I do this? Should I look at performance data or should I decide based on my gut feel? The answer naturally should be based on performance data! or incentives each one needs to get each month. This cannot be calculated by gut feeling but needs to looked at performance data. I need to decide on how much incentive each one needs to get for the month of ABC. How should I do this? Should I decide based on my gut feel? The answer	NA	

Performance Measurement	22	.....	
WEEK 4				
Performance Analysis	23	.....	
	24	Identify 1 SLA not met or not consistent in the last 3 months & perform a Pareto analysis & root cause analysis	To submit the pareto analysis graph & root cause fishbone for the SI A identified	
	25	1). Choose the main SLA & 3 most probable factors that affect that SLA & then try and identify if a relationship exist between them using Scatter Diagram. 2). For the SLA identified as not met or not consistent enough in the last 3 months, chart a Frequency distribution method to improve performance.	1). Submit 3 Scatter diagrams. 2) FD on an excel sheet.	
Quality	26	.....	
	27	.....	
WEEK 5				
Absenteeism	28	Calculate total unschedule absenteeism for your team for the last 3months on a daily basis & reproduce the same on a graph. Present this data to managers in every review. Also plot team member wise graph [this is only for unsceduled absenteeism] for 4 weeks	Submit team graph for last three months and also team member-wise graphs for 4 team members (for last 4 weeks)	
	29	.....	
	30	Check with every team member informally if they will be coming tomorrow. Start checking once 3/4 of the shift is over. Use techniques such as "Ok Anil, see you tomorrow" or "I'll let you know the answer to your question tomorrow" or "Be sure to get that chocolate as you promised	NA	

	31	.....	
	32	.....	
Attrition	33	Calculate attrition for your team for last three months in a weekly basis & plot the same on a graph. Present this data to managers in every weekly review.	Submit graph	
	34	.....	
	35	Track TENURE of every team member on an excel sheet. Tenure is different from date of joining. Tenure means how many months he/she has spent in the company and in your team. Create a format as following: Name of the team member, date of joining company, role at time of joining the company. role	Submit format.	
WEEK 6				
Performance Management	36	.....	
	37	For the main SLA, use the 5 steps in Performance Drivers [refer notes on Performance Drivers in the OnTrac courseware-Under Performance Management	Submit a document with the 5 steps for identifying performance drivers for your main SLA	
	38	.....	
	39	Conduct formal performance reviews, one-on-one with the team members on a weekly basis-use template given in notes in formal performance review [OnTrac courseware]	Submit a filled format [as given in the templete in the courseware] for 2 team members for 1 month [4 reviews per team member per month]	
	40	Conduct pre-shift briefings everyday with your team following the guidelines disscused in the class. Work out a 10-point agenda for your daily pre-shift briefing	Preshift briefing agenda document.	
Customer Focus	41		
	42		

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WEEK 7				
Training	44		
	45	Create atleast 2 training program for your team that are not related to calls or call taking ability. They should help develop the team member in a different area using the following instructions:1). Choose the topic relevent to your team. 2). Length of program-10 to 30 minutes.3). Determine Structure of program- Classroom/self study/OJT/Peer learning.4). Determine Instructional components-power-point,case studies,exercises,discussion s,etc.5). Create Content- Reserch, company policies/ops annual/client policies, etc.6). Fix schedule, Venue, timing	Submit framework for 1 training program that you will run in the quarter - using framework as discussed in class.	
Hiring	46	.....	
	47	.....	
Policies	48	1). Create a format with list of policies. 2). Give copies to each team member. 3). Educate team members on every policy. 4). Conduct a test on understanding of policies.	Submit sample test paper & team member-wise scores.	
	49	.....	
WEEK 8				
Performance Appraisals	50	Identify career objectives of team members and create a job objectives worksheet-refer format in courseware under this topic.	Submit job objectives worksheets for 2 team members.	
	51	.....	

Inter-departmental Interactions	52	Over the next 1 month organize for your team to meet with a representative from every department - so that team members can understand the department and also raise concerns if	NA	
	53	.....	
Understanding Financial Impact	54	Assign a monetary value for the loss incurred by your company on all team members in your team who are currently not meeting their targets [main SLA]. The loss time frame is one month. Refer notes/exercise section in this module and calculate loss incurred for previous month	Review with your managers.	
	55	.....	
Business Continuity Management	56	.....	