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Needs Analysis of Competency-Based Training for Customer Service Representatives

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ABSTRACT

Background

Traditional training methods often emphasize generic content and may fail to address the specific competencies needed for effective performance in customer service roles. Consequently, there is a growing need for competency-based training (CBT) programs that align training objectives with actual job requirements and performance expectations. CBT focuses on developing specific skills, behaviors, and knowledge areas that are directly linked to job success.

Purpose

This study aims to analyze the need for competency-based training for Customer Service Representatives (CSR) at Bank Syariah Indonesia (BSI), especially in Region VI Bandung.

Design/method/approach

Using a descriptive-verification approach with a non-experimental method, data were collected through a Likert questionnaire from CSR Region VI Bandung. Cluster analysis and Mann-Whitney tests revealed that out of 12 competency indicators, there were 8 indicators (such as empathy, communication, and problem solving) that showed significant differences between the superior and average CSR groups.

Results

This study shows that eight core competencies such as empathy, communication, and problem-solving need to be improved through focused training to enhance CSR performance at Bank Syariah Indonesia.

Contribution/value

This study holds strategic value in designing data-driven CSR competency training to enhance service quality in Islamic banking.

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INTRODUCTION

In today's highly competitive and customer-oriented business environment, the role of Customer Service Representatives (CSRs) is increasingly vital. CSRs act as the frontline interface between organizations and their clients, significantly shaping customer experience and brand perception (Johnston & Clark, 2017). With rising expectations for speed, accuracy, empathy, and problem-solving in customer interactions, it has become imperative for organizations to ensure that their CSRs possess the right set of competencies (Zeithaml, Bitner, & Gremler, 2020).

Competency-based training (CBT) offers a strategic approach to human resource development by focusing on clearly defined skill sets and measurable performance standards. Unlike traditional training models, CBT emphasizes outcomes that are aligned with job-specific tasks and behaviors (Mulder, 2014). For CSRs, this means training programs must target essential competencies such as effective communication, emotional intelligence, conflict resolution, digital literacy, and adaptability in handling diverse customer needs.

A thorough needs analysis is the foundation of effective competency-based training. It ensures that training interventions are relevant, targeted, and capable of addressing actual performance gaps (Brown, 2002). Without such analysis, training programs risk being misaligned with job demands and organizational goals, leading to wasted resources and limited improvement in service quality.

Given the critical role of CSRs in customer satisfaction and loyalty, this study seeks to conduct a needs analysis to identify the specific competencies required for CSRs and to inform the design of a more effective, competency-based training program. By aligning training efforts with identified needs, organizations can enhance service delivery, reduce turnover, and achieve better organizational outcomes (Saks & Haccoun, 2019).

Human Resource (HR) Development is a fundamental aspect in increasing organizational competitiveness, especially in the Islamic banking sector. According to Bukit et al. (2017), HR development not only aims to improve employee knowledge and skills, but also to shape professional attitudes and provide clear career paths. This is becoming increasingly crucial in the era of globalization where employee competency levels must always be improved to meet job demands (Kusumastuti, 2020). In the Islamic banking industry, especially Bank Syariah Indonesia (BSI) Region VI Bandung, this challenge is increasingly apparent with the high expectations of fast, accurate, and technology-based services. Data shows that only 10% of BSI Customer Service Representatives (CSR) consistently demonstrate superior performance, while the other 90% are at an average level. This phenomenon indicates the need to identify key competencies that differentiate superior from average performance, as a basis for developing effective training programs.

Competency-based training focuses on measurable outcomes and performance indicators rather than time-based learning. It enables employees to progress through training at their own pace, mastering each competency before moving forward. This ensures that learning is directly linked to workplace performance and business needs (Govaerts et al., 2011). Moreover, CBT facilitates the alignment of training with job

descriptions, performance evaluations, and career development pathways, making it a strategic tool for organizational growth and individual advancement (Saks & Haccoun, 2019).

The foundation of effective CBT lies in a rigorous **needs analysis**—a systematic process that identifies gaps between current and desired performance. This step is critical to ensuring that training content is relevant, targeted, and capable of improving job performance (Brown, 2002). For CSRs, a needs analysis can reveal deficiencies in key areas such as handling difficult customers, using digital platforms, managing stress, and delivering consistent service across channels (Stone & Dulebohn, 2013).

Furthermore, the rise of digital transformation, automation, and artificial intelligence in customer service roles has redefined the competency requirements for CSRs. Modern representatives must now operate across multiple platforms, interpret customer data, and personalize interactions in real time. This shift underscores the urgent need for updated training models that reflect emerging competencies and future workforce demands (World Economic Forum, 2020).

In this context, the present study aims to conduct a comprehensive needs analysis to determine the competency gaps among CSRs and provide recommendations for the design of a competency-based training framework. The outcome of this analysis will contribute to improving service effectiveness, enhancing employee confidence, and achieving greater alignment between employee performance and organizational objectives.

LITERATURE REVIEW

Management can be understood through two approaches: etymological and terminological. Etymologically, the term "management" comes from the word "to manage" which means to regulate, including the process of planning, organizing, implementing, and supervising to achieve organizational goals (Rohman, 2017). George Terry (1964) defines management as a series of activities that involve the use of human and other resources effectively and efficiently. This approach emphasizes the importance of management functions in achieving organizational goals (Wijaya & Rifa'i, 2016). Based on general management principles, educational management adapts similar functions with a focus on the education sector.

According to Djam'an Satori (1980), educational management is a collaborative process that combines personnel and material resources to achieve educational goals effectively. Meanwhile, the Planning Bureau of the Ministry of Education and Culture (1993) added that its objectives include the formation of the character of students who are faithful, knowledgeable, and have noble character. Human Resources (HR) are strategic assets that determine the competitive advantage of an organization. According to Simamora (1997), HR management involves the utilization, development, and assessment of employees to support organizational goals.

The competency-based approach, as developed by Boyatzis, focuses on identifying characteristics that drive superior performance (Kusumastuti, 2020). Competencies include five basic characteristics:
Motives: Psychological drives that influence actions, Aptitudes: Innate characteristics such as emotional intelligence, Knowledge: Specific technical expertise, Skills: Physical or mental abilities, and Attitudes: Behaviors reflected in work. Competencies are divided into two categories: threshold (minimum) and differentiation (superior performance distinguishers) (Berger, 2004). A needs analysis is the foundational step in designing effective training programs. It involves identifying performance gaps between current employee capabilities and the competencies required by the job (Brown, 2002). This process ensures that training investments address actual workplace challenges and are tailored to meet the specific needs of employees. For CSRs, needs analysis helps pinpoint weaknesses in communication, problem-solving, product knowledge, and emotional intelligence.

METHOD

Participants

The participants consisted of 120 Customer Service Representatives from a telecommunications company operating across multiple branches in Indonesia. A purposive sampling technique was used to select individuals who had at least one year of experience in customer-facing roles.

Instruments

Data were collected using a structured questionnaire developed based on a competency framework adapted from international customer service standards (e.g., ICSA and ISO 10002). The questionnaire consisted of three sections: (1) demographic information, (2) self-assessment of current competencies, and (3) perceived importance of each competency. The competencies evaluated included communication skills, problem-solving, emotional intelligence, product knowledge, digital literacy, and conflict resolution.

Data Collection Procedure

The questionnaire was distributed via email and online survey platforms over a period of two weeks. Participants were informed of the study's purpose and confidentiality was assured. Consent was obtained prior to participation.

Data Analysis

The data were analyzed using descriptive statistics (mean, standard deviation) to identify gaps between perceived current competencies and required competency levels. Gap analysis was used to prioritize training needs by comparing the importance rating and current proficiency levels. Additionally, correlation analysis was conducted to examine relationships between demographic variables and training needs.

RESULTS

The first step taken in this study in analyzing research data is to conduct a cluster test. The goal is to find out two groups of competencies based on respondents' answers.

Competencies in this study are divided into two groups, namely the average competency group and the superior competency group. The results of the cluster test are as follows:

Table 1 Table Cluster Test Results

Agglomeration Schedule

Stage	Cluster Combined		Coefficients	Stage Cluster First Appears		Next Stage
	Cluster 1	Cluster 2		Cluster 1	Cluster 2	
1	20	21	1.000	0	0	7
2	33	34	2.000	0	0	7
3	30	32	2.000	0	0	8
4	14	31	2.000	0	0	10
5	11	16	2.000	0	0	13
6	10	12	2.000	0	0	20
7	20	33	2.500	1	2	16
8	29	30	3.000	0	3	19
9	8	28	3.000	0	0	14
10	14	15	3.000	4	0	14
11	6	13	3.000	0	0	12
12	6	9	3.500	11	0	13
13	6	11	4.000	12	5	17
14	8	14	4.500	9	10	15
15	5	8	4.600	0	14	18
16	18	20	5.250	0	7	24
17	6	17	5.400	13	0	23
18	5	27	5.833	15	0	22
19	25	29	6.000	0	8	21
20	7	10	6.000	0	6	22
21	25	26	7.500	19	0	24
22	5	7	7.857	18	20	23
23	5	6	8.500	22	17	26
24	18	25	9.280	16	21	25
25	18	24	11.400	24	0	27
26	5	19	11.875	23	0	28
27	18	22	13.636	25	0	29
28	5	23	16.647	26	0	29
29	5	18	32.315	28	27	30
30	3	5	295.967	0	29	0

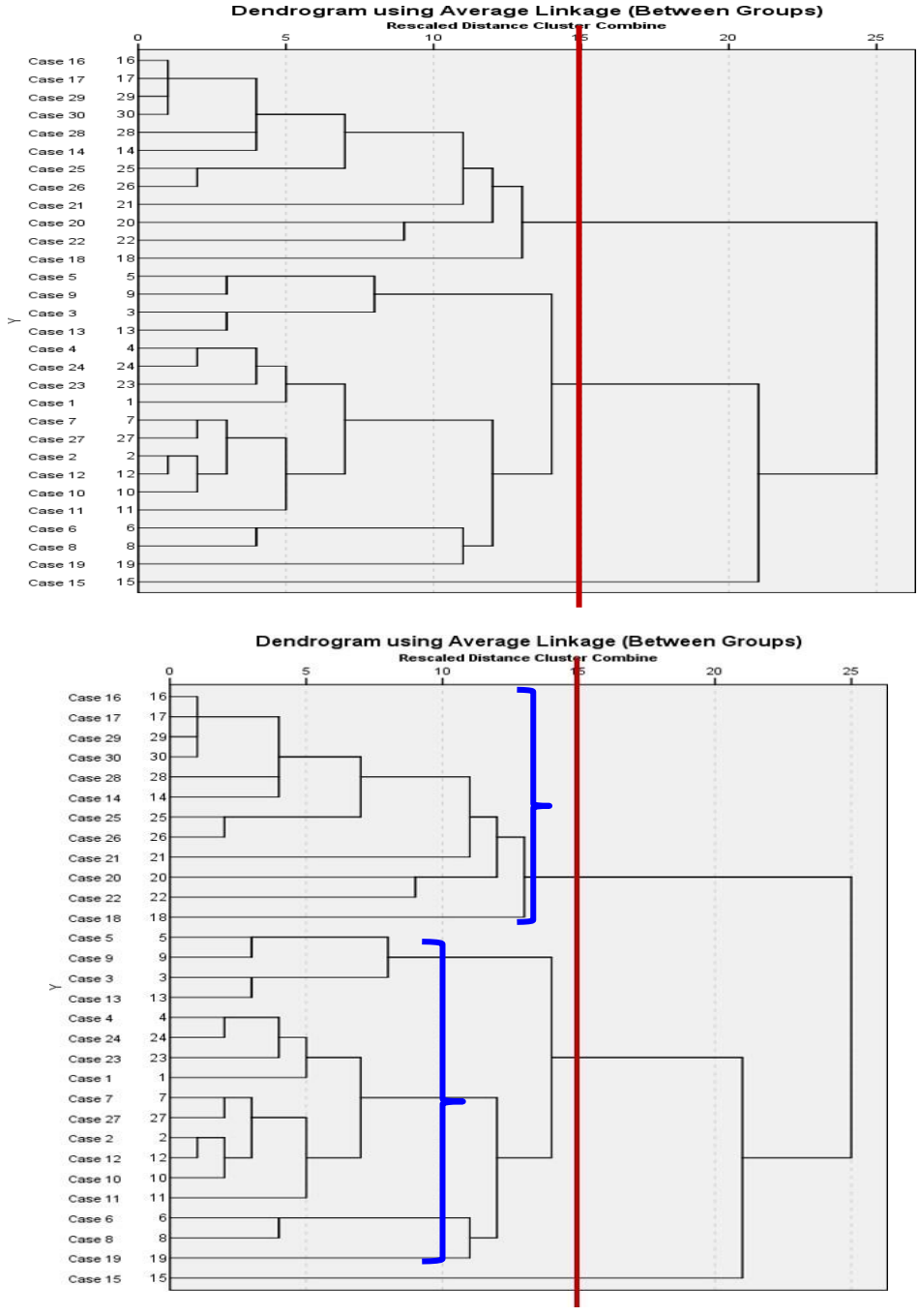

Image 1.1 Result Dendogram

Explanation: The red line shows that there are 2 clusters that are classified into the superior group and the average group.

Kelompok CSR Kinerja rata rata	Kelompok CSR Kinerja unggul
Case 16	Case 5
Case 17	Case 9
Case 29	Case 3
Case 30	13
Case 28	4
Case 14	24
Case 25	23
Case 26	1
Case 21	7
Case 20	27
Case 22	2
Case 18	12
	10
	11
	6
	8
	19

The results of the Whiteney Test for Cluster Category 1 are Numbers 1, 4, 11, 12, 9, 13, 15, 19, 18, 22, 16, 24, 23, 25, 26 and 28, while the Cluster category 2 is Numbers 2, 3, 5, 10, 14, 7, 8, 6, 20, 17, 21, 27 and 29 are included in the cluster category 2. After knowing the cluster division, the next stage is to conduct a difference test with the Mann Whitney test. After knowing the division of two groups through cluster test, the next stage is to conduct Mann Whitney test to find out whether there is a difference in competence in the two groups. The results of Mann Whitney test are as follows:

Ranks

	Kluster	N	Mean Rank	Sum of Ranks
Target	1	18	21.17	381.00
	2	12	7.00	84.00
	Total	30		
Teliti	1	18	14.78	266.00
	2	12	16.58	199.00
	Total	30		
Empaty	1	18	21.44	386.00
	2	12	6.58	79.00
	Total	30		
CSer	1	18	20.50	369.00
	2	12	8.00	96.00
	Total	30		
Kom	1	18	20.72	373.00
	2	12	7.67	92.00
	Total	30		
Mem	1	18	15.92	286.50
	2	12	14.88	178.50
	Total	30		
P Masalah	1	18	21.17	381.00
	2	12	7.00	84.00
	Total	30		
Bisnis A	1	18	21.28	383.00
	2	12	6.83	82.00
	Total	30		
Adaptasi	1	18	20.53	369.50
	2	12	7.96	95.50
	Total	30		
Percaya diri	1	18	19.83	357.00
	2	12	9.00	108.00
	Total	30		
Pengendalian D	1	18	15.50	279.00
	2	12	15.50	186.00
	Total	30		
Kejujuran	1	18	16.83	303.00
	2	12	13.50	162.00
	Total	30		

Based on the test results, it can be explained that of the twelve (12) competency measurement indicators, there are four (4) indicators where there is no difference between customer service representatives (CSR) who have superior competency and average competency and eight (8) indicators where there is a difference in competency between CSRs who have superior competency and average competency.

Descriptive Data Processing Results

No	Indikator Kompetensi	Nilai Signifikansi	Keterangan
1	Target	0.000	Terdapat perbedaan
2	Teliti	0.455	Tidak terdapat perbedaan
3	Empati	0.000	Terdapat perbedaan
4	*Customer Service Orientation*	0.000	Terdapat perbedaan
5	Komunikasi	0.000	Terdapat perbedaan
6	Memimpin	0.680	Tidak terdapat perbedaan
7	Pemecahan Masalah	0.000	Terdapat perbedaan
8	Bisnis A	0.000	Terdapat perbedaan
9	Adaptasi	0.000	Terdapat perbedaan
10	Percaya Diri	0.000	Terdapat perbedaan
11	Pengendalian Diri	1.000	Tidak terdapat perbedaan
12	Kejujuran	0.085	Tidak terdapat perbedaan

Souurce : Precesing result, 2022

DISCUSSION

it can be concluded that competency development is a key element in improving service quality at Bank Syariah Indonesia. The study found that out of 12 competency indicators, 8—such as empathy, communication, problem-solving, and customer service orientation—showed significant differences between superior-performing and average-performing CSR staff. Using a descriptive-verificative approach along with Mann-Whitney and cluster analysis, the study highlights the need for targeted training focused on strengthening core competencies. Training not only improves technical skills but also

fosters professional attitudes in Sharia-compliant service environments. By identifying real competency gaps, BSI can develop training programs that meet the actual needs of employees. This aligns with the challenges faced by the Islamic banking industry, which demands excellent and ethical service amid global competition. Therefore, integrating training with Sharia values becomes a strategic step toward creating outstanding human resources in this sector.

CONCLUSION

This study aims to analyze the need for competency-based training for Customer Service Representatives (CSR) at Bank Syariah Indonesia (BSI), especially in Region VI Bandung. Based on a descriptive-verification approach with a non-experimental method, this study successfully identified eight out of twelve competency indicators that showed significant differences between superior and average performing CSRs, namely indicators: target, empathy, customer service orientation, communication, problem solving, business understanding, adaptation, and self-confidence. These findings emphasize the importance of targeted training that focuses on strengthening these core competencies to improve overall service quality. Cluster analysis and the Mann-Whitney statistical test were used as the main analysis methods to group and differentiate competency characteristics between the two CSR groups. From the test results, it is known that the other four indicators (accuracy, leadership, self-control, and honesty) did not show significant differences, indicating that these aspects are evenly distributed in both CSR groups. However, the existence of competency gaps in important indicators such as empathy and communication indicates the need for a focused training strategy to bridge the gap. The practical implications of this study are very clear, namely the need to develop a systematic competency-based training program, relevant to the challenges of CSR work in the digital era, and integrated with sharia values. Theoretically, this study contributes to the literature on HR management and work competencies, especially in the context of the Islamic banking industry which demands high-quality and ethical services. This study opens up opportunities for further studies, especially those focused on measuring the effectiveness of training in the long term and exploring CSR competency development models based on technology and Islamic values. Thus, the results of this study not only provide a basis for improving training policies at BSI, but also serve as a reference for other Islamic banking institutions in building service excellence based on competencies and Islamic values.

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