

LEADERSHIP IMMERSION FOR EXCELLENCE

Contact Center Immersion Guide



WELCOME

This document is the step-by-step procedure and worksheet for completing a LIFE department immersion from start to finish: planning, approvals, execution, reflection, and completion credit.

Participants use it to schedule and complete an on-the-clock immersion, follow the on-the-job training checklist to observe/practice key tasks, and confirm competency.

It also guides a leadership-focused reflection conversation with the department leader and provides the final verification fields needed to submit the completed form to Learning & Development.

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WESTGATE RESORTS
LEARNING & DEVELOPMENT



LIFE Immersion Procedure

Planning & Approvals

- **LIFE Participant:** Select **five (5)** departments to complete immersions.
- **Learning & Development Manager:** Coordinate with departments and provide the **Immersion Training Point of Contact (POC)** for each immersion.
- **LIFE Participant:** Email the **Immersion Training POC** to request an immersion date/time and **tentatively schedule** the session(s).
 - Immersions are typically **½ day to full day**, and time may be **split across multiple sessions/days** as needed.
- **Immersion Training POC:** Align the participant with an appropriate trainer/leader and confirm logistics for the session(s).
- **LIFE Participant:** Obtain **manager written approval via email** before finalizing/attending (include department, date/time, estimated duration, and note it is **on the clock**).
- **Manager:** Reply with written approval (required).

Immersion Execution

- **LIFE Participant:** Complete the immersion **on the clock** (paid working time).
- **Trainer/Leader (CFT, Supervisor, Manager, or Department Head):** Train/shadow the participant using the **on-the-job training checklist** and learning objectives.
- **LIFE Participant:** Follow the checklist and demonstrate understanding.

Reflection & Completion

- **LIFE Participant:** Schedule a reflection discussion with the **Department Head** or **Department Manager** (during the immersion, immediately after, or on a separate day).
- **Department Head / Manager:** Review the reflection questions with the participant and discuss key takeaways.
- **LIFE Participant:** Complete the immersion form and submit it to the **Learning & Development Manager** to receive completion credit.

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Contact Center OJT Checklist

All checklist items should be trained on, observed, and practiced (where appropriate and as time allows).

- Observed the end-to-end workflow for handling inbound contacts (calls, chats, emails), including greeting, verification, identifying the reason for the contact, documenting details, resolving the issue, and closing the interaction in the system.

- Explained how the Contact Center coordinates with on-property and support teams (Front Desk, Reservations, Housekeeping, Engineering, Security, Sales) to fulfill guest and Owner requests, including how information is passed between guest-facing teams and support functions.

- Supported service delivery during a peak contact period by observing queue management, understanding how contacts are prioritized, and identifying opportunities for guest engagement (setting expectations, offering solutions, sharing relevant resort or ownership information).

- Discussed how guest and Owner feedback is captured and used, including call notes, CRM records, surveys, and escalations, and how feedback informs scripts, training, and process improvements within the Contact Center and across resort operations.

- Explained how real-time performance metrics drive decisions, including how visibility into service level, average handle time, abandonment rate, and first-contact resolution supports staffing, coaching, and a consistent guest/Owner experience.

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Leadership Reflection Questions

Please answer the questions below based on your OJT and meeting with the department head or manager.

Department Role & Goals

In your own words, what are the main goals and day-to-day responsibilities of the Contact Center team?

How does a Contact Center leader translate those goals into clear priorities, accountability, and daily execution for the team?

Impact on Guest Experience

How does the Contact Center directly and indirectly impact the guest experience from pre-arrival through post-stay (and for Owners, across the ownership lifecycle)?

How does a leader influence service consistency (tone, standards, recovery) and coach the team to protect the guest/Owner experience during both routine and high-stress interactions?

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Peak Times & Challenges

What are the busiest times of day, week, or season for the Contact Center, and what common challenges show up during those periods (volume spikes, complex issues, staffing gaps, system constraints)?

What does a strong leader do differently during peak periods (staffing decisions, queue management, communication, escalation thresholds) to reduce bottlenecks and keep service levels high?

Measures of Success

What metrics or measures are used to define success for the Contact Center (e.g., service level, AHT, abandonment, QA scores, CSAT, first-contact resolution), and why do they matter?

How does a leader use these metrics to coach performance, recognize wins, and make operational adjustments (rather than treating metrics as “reporting only”)?

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Cross-Department Collaboration

Which departments does the Contact Center interact with most frequently, and how does collaboration with those teams help deliver a better guest/Owner experience?

How does a Contact Center leader build relationships and set shared expectations with other department leaders to improve communication quality, response time, and closure of guest/Owner needs?

Example of Great Collaboration or Service

Describe an example you observed or heard about where cross-department collaboration or Contact Center service went especially well. What made it successful?

What leadership behaviors contributed (pre-briefing, clear ownership, escalation discipline, follow-up), and how could those behaviors be replicated consistently?

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Handling Guest Issues

How does the Contact Center typically handle guest/Owner issues and complaints, and what did you notice about communication during escalated interactions?

When escalation is needed, how does a leader decide what to authorize, how to support the agent, and how to ensure the guest/Owner receives a consistent and professional resolution?

Opportunities to Improve

If you could recommend one process or practice to improve efficiency or satisfaction in the Contact Center, what would it be and why?

What role should the department leader play in evaluating the idea, removing barriers, and implementing it so it sticks (training, reinforcement, measurement)?

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Skills for Success

Based on your immersion, what skills or qualities make someone especially successful in the Contact Center (communication, de-escalation, multitasking, system proficiency, empathy, accuracy)?

Which of those skills are most influenced by leadership (hiring, training, coaching, culture), and how does a leader develop them in the team?

Service Standards & Consistency

What service standards, behaviors, or expectations seem most important for Contact Center team members to deliver consistently (greeting, verification, documentation quality, follow-up, tone)?

How does a leader reinforce these standards day-to-day (coaching, QA calibration, modeling, recognition, corrective action) to maintain consistency across shifts/channels?

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Safety, Security, & Risk Awareness

What risk controls does the Contact Center support (identity verification, privacy/data handling, payment security if applicable, accurate documentation, fraud awareness)?

How does a leader ensure the team stays compliant and confident in these procedures –especially during peak times or escalations?

Incident Response & Escalation

If a safety concern, urgent situation, or service disruption occurs (e.g., guest safety call, major system outage, high-severity complaint), what is the escalation path and expected communication flow?

How does a leader coordinate with Security, Front Office, Engineering, and resort leadership to make timely decisions, document appropriately, and protect guests/Owners and team members?

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Training Verification

Please fill out the information below and submit the entire document back to your Learning & Development Program Manager.

Training Confirmation:

Please submit the name(s) of the trainers that facilitated your immersion along with their job title. (i.e. John Reinaldo, Contact Center Supervisor).