

Part I:

Background Information

Customer Service Representative Case Study

BACKGROUND

Vivian Huggins was a band instructor for over 20 years before she lost her vision. She taught music and musical instruments in the middle school, teaching grades 6-8, and says being accustomed to listening made it somewhat easier to adapt to a world without vision. Her vision dramatically decreased on September 13, 1986 and this was the last day she taught. The ADA (America’s with Disabilities Act) had not been passed and she never pursued, or was offered, a chance to discuss return to work with accommodations.

Vivian’s ophthalmologist referred her to the Low Vision Clinic at the Center for the Visually Impaired (CVI). Upon completion of their evaluation and recommendation she was referred to the Vocational Rehabilitation Agency (VR) and placed on a waiting list for the CVI rehabilitation program. During this waiting period, which for Vivian lasted almost a full year, Vivian says she gained weight and spent the year “wallowing in self pity.” After completion of the four month CVI program she continued her involvement with this facility since they also assisted her VR counselor with job placement.

Vivian interviewed with several agencies, including children’s shelters and detention centers, as she attempted to continue her involvement with children. She was told her level of vision was not sufficient to allow return to work in these areas and eventually her counselor referred her to a Computer and Customer Service Course, sponsored by Goodwill Industries. Upon completion he arranged several interviews with banks, including Wachovia, where she was eventually hired.

FUNCTIONAL LIMITATIONS

Vivian began having periods of visual loss, initially in her right eye, but eventually involving both eyes, with a gradual worsening with each episode. She was diagnosed with Optic Neuritis and when she completed the training and returned to work with Wachovia, could see the computer screen with magnification. However, within several months another episode left her with only some light perception and the ability to differentiate bold colors. She uses the services of a guide dog to aid with mobility and transportation.

JOB DESCRIPTION

Customer service representatives perform a wide variety of functions, such as interviewing customers who want to open a checking or savings account, or answering inquiries about the array of available financial services. Wachovia has a large call center where Vivian was hired to answer telephone calls and questions from current account holders.

Essential Functions of the Job

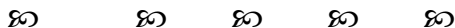
1. Investigates bank policies and procedures to correct errors made on customer accounts. Must be able to quickly access this information, as well as the customer's records.
2. Answers questions about the banks services such as Individual Retirement Accounts, Certificates of Deposit, savings bonds and securities.
3. Document nature of inquiries and outcome of each call.

EMPLOYER CONSIDERATIONS

Wachovia Bank hired Vivian to work in their call center as one of 80 customer service representatives on the same day she interviewed in March 1989. Her interviewer had actually taught for four years and told Vivian that if she could teach for over 20 years she could certainly handle the customer service representative position. Vivian explained the technology available to her and convinced him she could perform the job with AT adaptations using Wachovia's system. She was the first visually impaired customer service representative hired by Wachovia and her goal was to do the job well enough to allow others with visual impairments to be given the same opportunity.

A consultant from the Client Assistance Program was retained by Wachovia to provide technical assistance and training after she was hired and other professionals with the Center for Assistive Technology and Environmental Assistance (CATEA) and the VR agency helped install her computer adaptations.

The employer was committed to eventually hiring other visually impaired employees and in preparation for this step provided sensitivity training for their entire call center staff. Various aspects of blindness were explained as well as how to behave around guide dogs and the type of equipment that would be utilized by the visually impaired customer service representatives. A safety committee was also created to explore related issues and assist with any re-design of the office space. A challenge for all employees was the upgrade from DOS to a Windows Operating Environment. Technical support personnel from Wachovia worked closely with Vivian's rehabilitation team to make necessary systems modifications.



Tech Connections is a collaborative project of the United Cerebral Palsy Associations, the Center for Assistive Technology and Environmental Access at the Georgia Institute of Technology (CATEA), and the Southeast Disability and Business Technical Assistance Center (SEDBTAC). Funding provided by a grant from the National Institute on Disability and Rehabilitation Research of the Department of Education, Award #H133A980052. Content and opinions expressed in these materials do not necessarily reflect those of the NIDRR, UCP, CATEA, SEDBTAC, or other entities.

REV 020503