Measuring What Matters!

Are Your Metrics Helping Boost Performance?
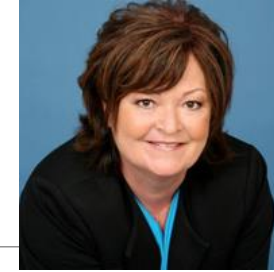
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Contact Strategies Inc. is an independent consulting and training firm that has been actively involved in the contact centre industry for more than two decades, working with clients in Canada, US, Philippines, India and Latin America. We have seen the industry grow and evolve and have experienced first-hand how a well-run contact centre can positively impact an organization's revenues and reputation.

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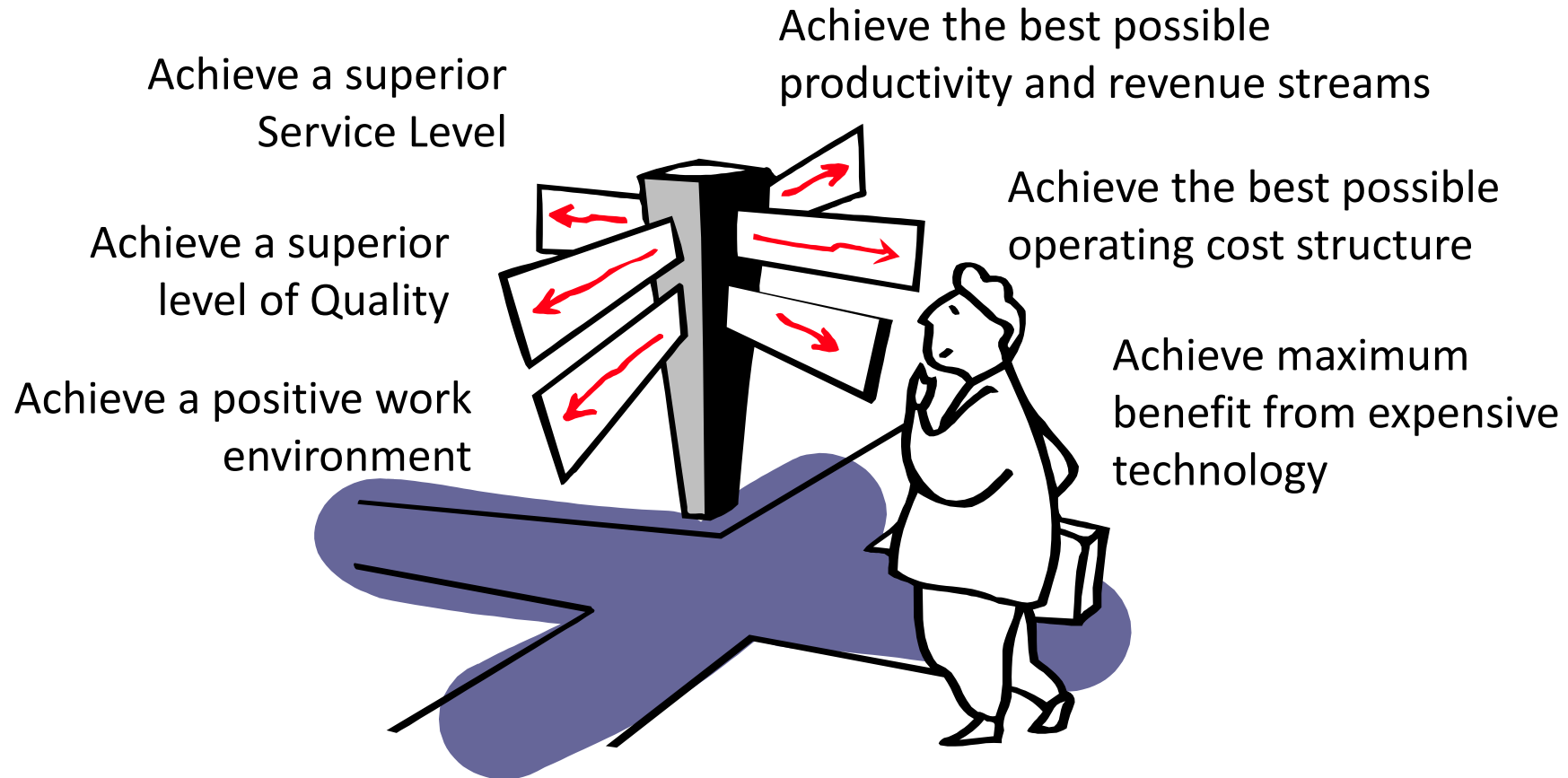M: 416-526-7699
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Session Overview:

- Why Measure?

- What to Measure?

- What are the essential KPIs and diagnostic metrics?

- Best Practices – Are they right for your organization?

Demands on Today's Contact Centre Leadership

Achieve a superior Service Level

Achieve the best possible productivity and revenue streams

Achieve a superior level of Quality

Achieve the best possible operating cost structure

Achieve a positive work environment

Achieve maximum benefit from expensive technology

The Contact Centre Leadership Challenge

R - *RIGHT* number of the *RIGHT* people

R - In the *RIGHT* place

R - At the *RIGHT* time

R - Doing the *RIGHT* things the *RIGHT* way, using the *RIGHT* tools!

Why Should You Measure?

- Supports strategy and goal setting
- Review the Centre performance
- Review individual Agent performance
- Improves accountability
- Analyze trends
- Informed decision making
- Provides insight into root cause analysis

What is a KPI?

KEY PERFORMANCE INDICATOR (**KPI**) is a performance measurement, used by the contact centre to evaluate its success in terms of achieving its operational goals.

1) Choosing the right KPIs is reliant upon having a good understanding of what is important in terms of delivering service in an 'efficient' and 'effective' manner.

2) KPIs lead to the identification of potential improvements; at an individual and organizational level and are critical to defining and prioritizing 'performance improvement' initiatives.
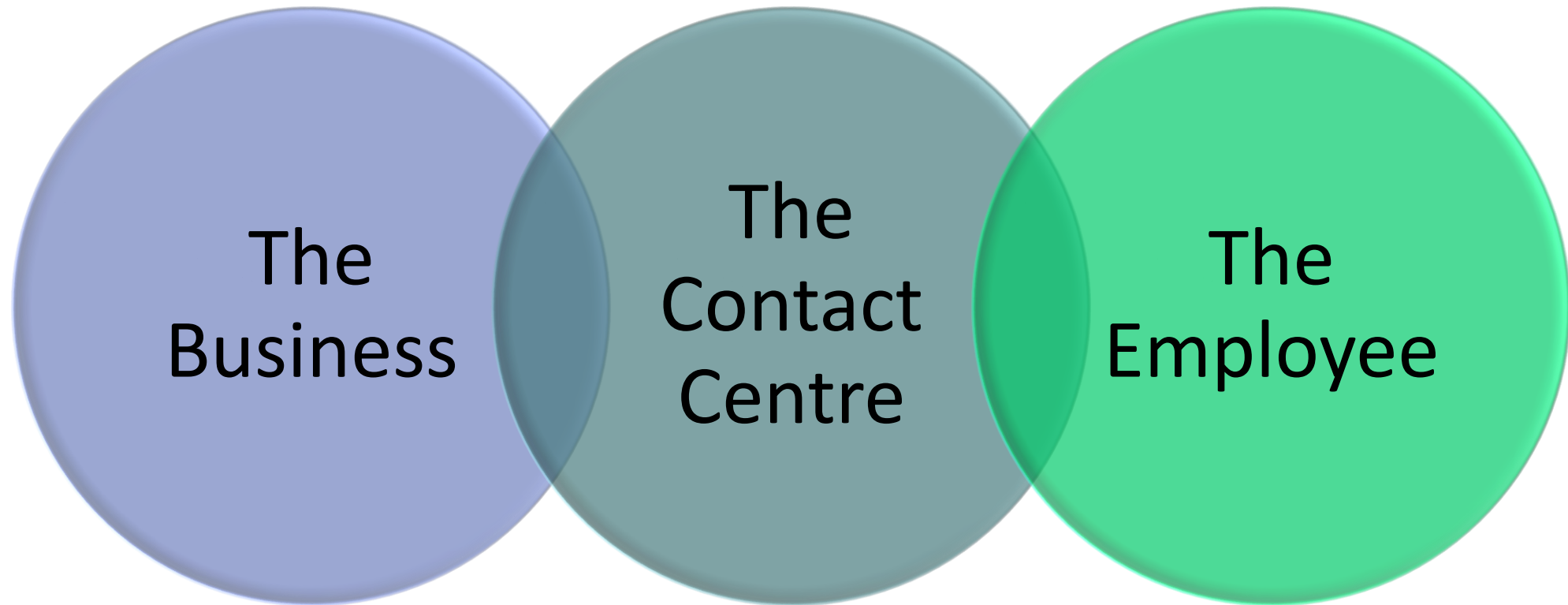
What is a Best Practice?:
An innovative activity and/or specific metric that **fits your culture** and that when repeated and reinforced contributes to sustainable performance improvement and positive results.

DATA – is critical in order to meet the informational needs of...

The Business

The Contact Centre

The Employee

Let's Break This Down!

What are the Essential **EFFICIENCY** Metrics?

Telephone Service Level (TSL)

> **X% of Calls Handled within Y# of Seconds**

o **Why** Measure TSL?:

- Impacts Customer Satisfaction
- Provides Link between Resources and Results
- Balance Revenues and Costs
- Competitive Environment
- Corporate Strategy

o **When** Measure TSL?

- Hourly, Daily

Understanding Service Levels
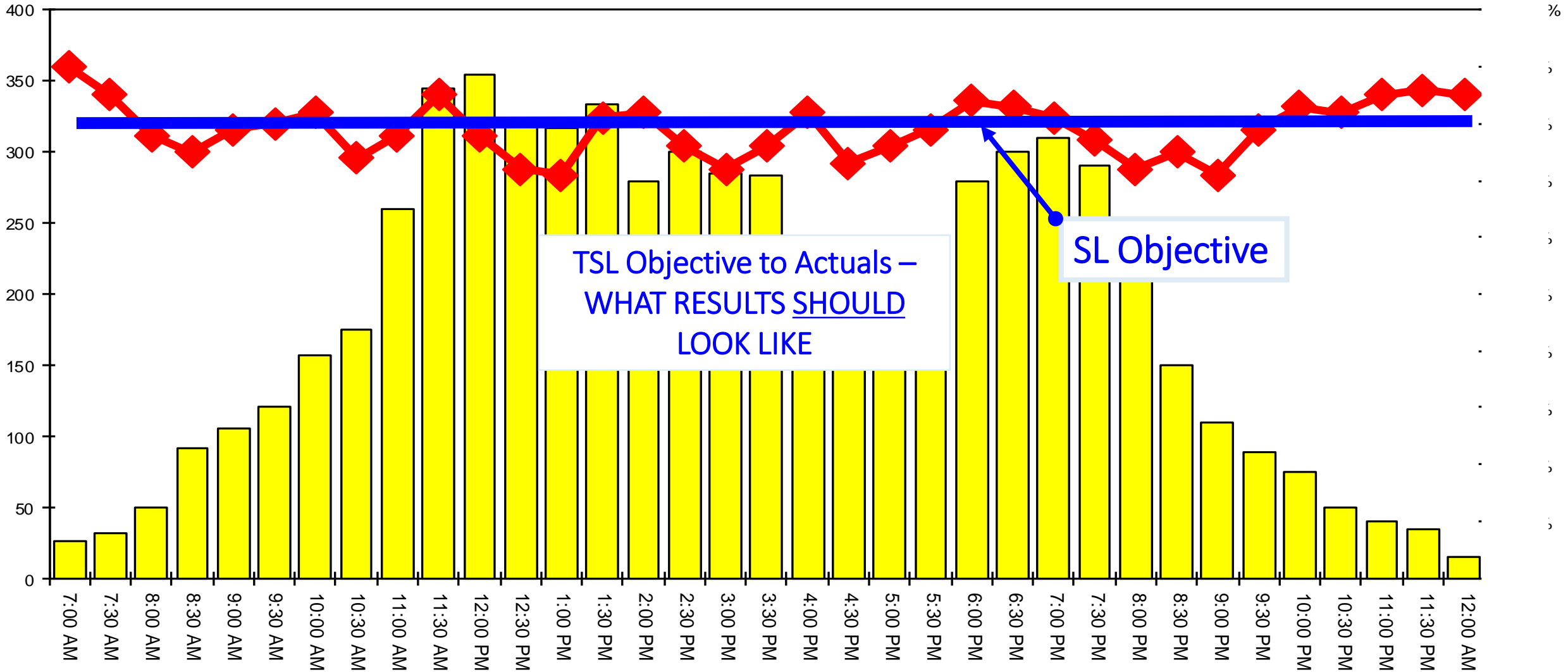## – *What is it, and Why is it so Important?*

1) Live Telephone Contact:
   - There is no industry standard Service Level
   - Business Decision
   - Competitive Advantage
   - Cost Containment / Budget
   - Historical/Seasonal Volumes

2) Other Contact Types (Email, Chat, Social Media, Fax):
   - Response Time Targets

Call Volume and Service Level Impact

Call Volume and Service Level Impact

Legend: Call Volume | Telephone Service Levels
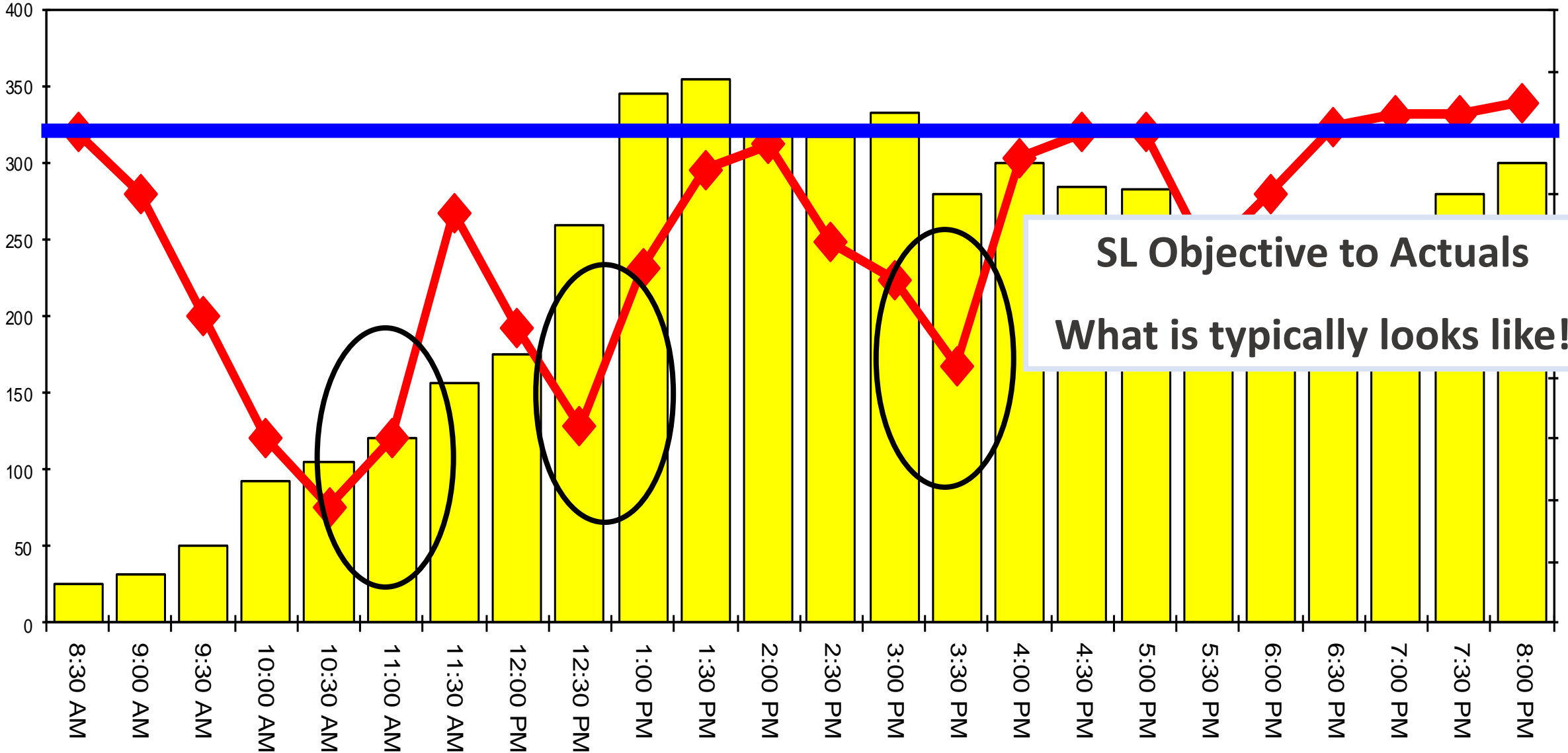
SL Objective to Actuals

What is typically looks like!

Managing the Caller's Wait Experience

Service Level
- X% of calls answered within X# of seconds
- Business Decision
- Reporting Interval

ASA
- Average Speed of Answer for 100% of calls presented

Managing the Caller's Wait Experience
What happens when you don't ?

Abandoned Calls

(Callers that hang up while waiting in queue)

- Reported in # of calls and % of total calls and can be reported by Queue or Centre
- Insight into Caller Tolerance for Waiting
- What factor(s) affect abandon rates?
- Do you control abandon rate?
  - Consider # of seconds before abandoned
  - Technology solutions?

Maintain a Consistent Service Level

Caller Tolerance

There are several factors that affect caller tolerance:

◦ Motivation

◦ Availability of substitutes

◦ Competition's Service Level

◦ Level of expectation

◦ Time available

◦ Who is paying for the call

◦ Human behaviour

The Correlation

↑ Service Levels = ↓ Abandon Rates

↓ Service Levels = ↑ Abandon Rates
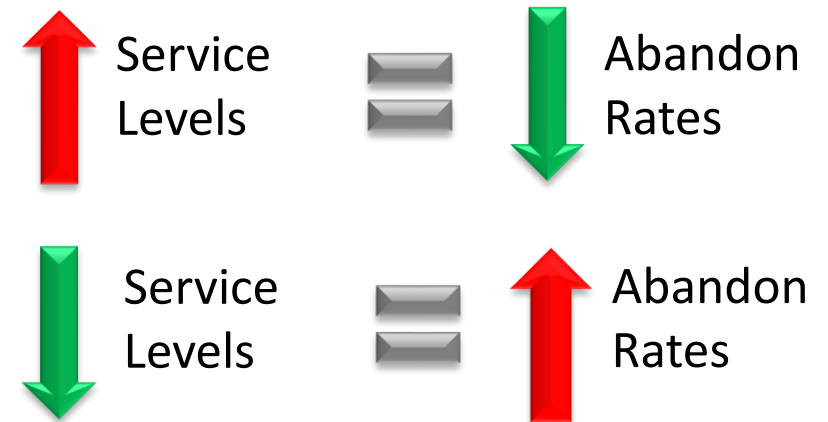
Source: ICMI Handbook – Operation Management

Efficiency Metrics:
Front-Line Agent Productvity

Normalized or True Calls Handled / Hour

- # of Calls an Agent handles in the time they have control over
- Insight into Knowledge & Skill

What does this ACD Report tell you? What AGT is the most productive?

			--------ACD-DN CALLS--------			-----NON ACD CALLS-----				------TOTAL TIME-----			

Agent By ACD-DN Performance Report
Bi-Weekly Report

Page 1

ACME TEL & TEL
Days:

Time: 09:57:43

AGT ID	DAY	ACD-DN	NUM ANSWD	AVG TALK SEC	AVG WAIT SEC	NUM IN	NUM OUT	TIME IN HH:MM	TIME OUT HH:MM	NOT RDY HH:MM	MAND HH:	MM	ACD/ MAND %
2100			277	254	24	1	116	0:07	2:49	4:10	28:	04	84
2101			493	177	26	1	88	0:02	1:33	5:07	34:	05	86
2102			146	258	13	7	24	0:21	0:51	2:13	14:	01	89
2103			226	245	15	5	48	0:30	1:13	3:39	20:	51	91
2105			361	270	17	0	82	0:00	1:49	4:45	34:	20	93
2106			399	264	23	0	123	0:00	2:33	4:42	38:	20	88
2107			450	223	20	0	127	0:00	3:22	3:33	36:	59	85
2108			412	234	20	1	134	0:05	2:43	7:09	38:	47	88
2109			500	269	12	1	104	0:00	2:01	5:49	45:	58	94
2110			651	229	17	0	169	0:00	4:34	6:53	54:	41	88
2112			319	276	12	1	23	0:03	0:52	7:25	33:	34	95
2114			396	280	22	0	164	0:00	1:58	4:05	38:	54	90
2115			204	545	10	3	40	0:55	1:20	9:09	42:	21	95
2116			239	470	13	0	98	0:00	1:33	8:46	42:	06	95
2118			248	210	11	0	85	0:00	2:16	14:27	31:	28	92
2120			480	240	14	0	93	0:00	2:50	5:50	41:	48	91
2122			492	202	21	1	64	0:02	2:30	6:48	39:	18	88
2123			680	258	13	0	77	0:00	2:00	3:08	56:	00	93
2127			274	293	9	0	44	0:00	0:53	5:11	28:	27	97
2128			173	330	11	0	16	0:00	0:33	2:47	19:	32	96

Best Practice Efficiency/Productivity Measures
Consider the Issues

Issue

1. Variation in # of Hours Worked

    - F/T versus P/T

    - Off-Phone Activities

2. Complexity of Calls

    - Long versus Short Calls

3. Call Volume Variation Between Shifts

Solution

1. Use Average Calls per Sign-On Hour

2. Assess Efficiency over longer time intervals (weekly or bi-weekly)

3. Remove Wait Time from the equation

Efficiency - Productivity

$$\text{Calls/Hour Processed} = \frac{\text{\# of calls handled}}{(\text{manned time}) - (\text{wait time})}$$

Calls/Hour is a reflection of the number of calls an agent can process within the time they have control over.

LET'S TEST YOUR MATH SKILLS! …

AGENT #2101	AGENT #2123
Answered 493 calls during reported period Log In Time = 34.1 hours 3.6 hours spent waiting for calls (idle time)	Answered 680 calls during reported period Log In Time = 56.0 hours 2.5 hours spent waiting for calls (idle time)

HOW CALCULATED?

True Calls/Hour = Calls Answered/(Log In time – Wait or Idle Time)

TCH = 493 / (34.0 – 3.6) **16.2 True Calls/Hour**	**TCH = 680 / (56.0 – 2.5)** **12.7 True Calls/Hour**

AUDIENCE QUESTION

Does your centre have an AHT (Average Handle Time) performance target for your front-line agents?
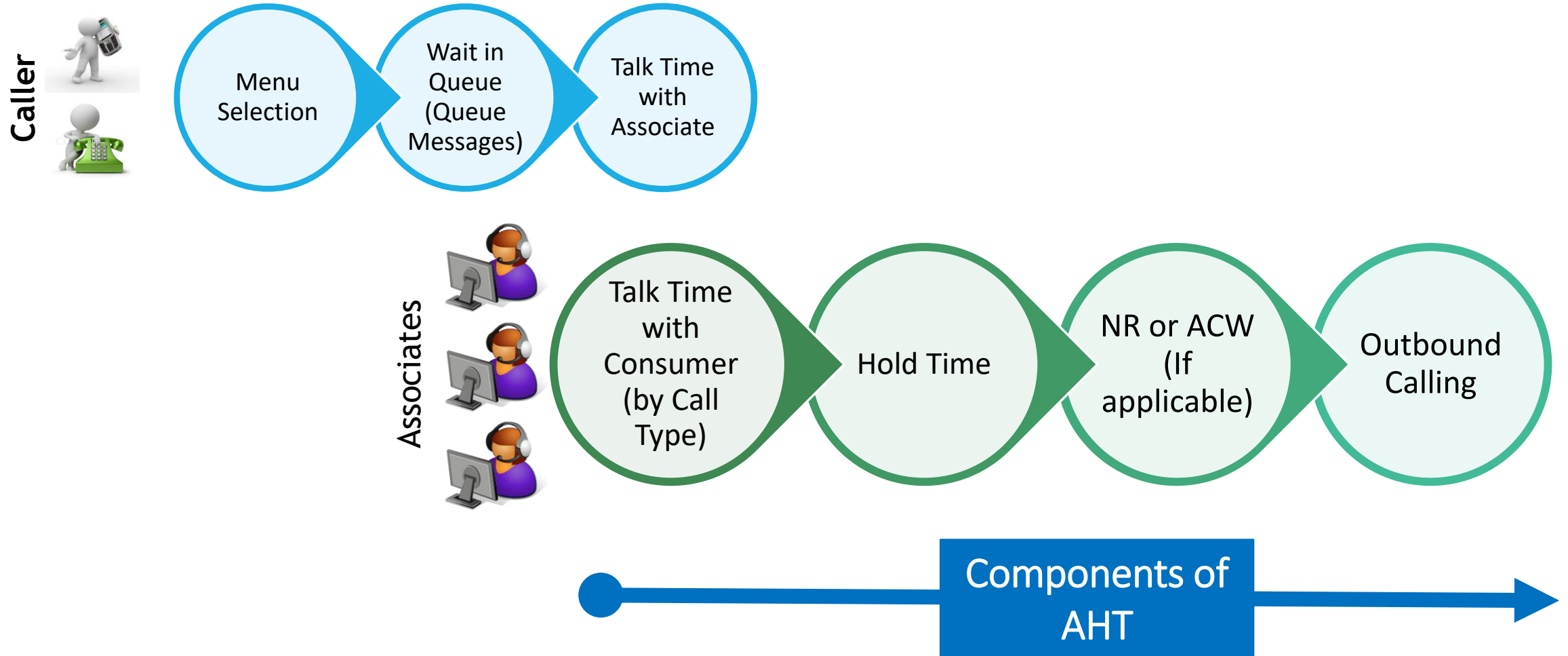
1. Yes?
2. No?

Efficiency Metrics – Centre and Agent

Average Handle Time

- Diagnostic or Secondary Metric
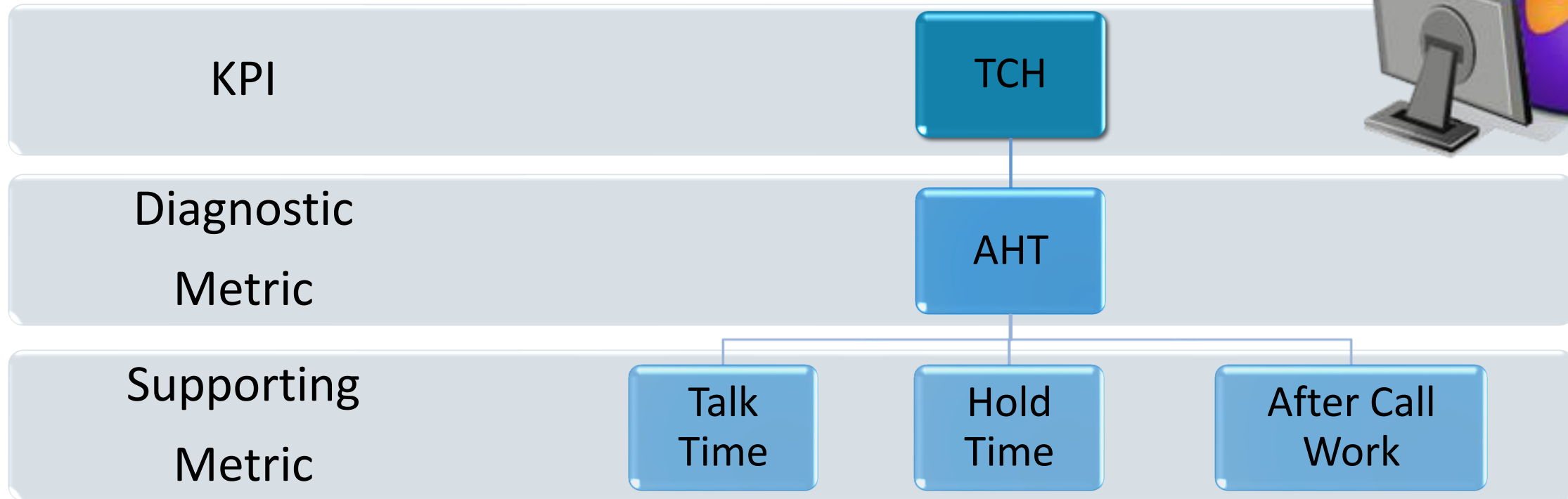- Critical metric for staffing and scheduling

AHT Analysis

Caller

Menu Selection → Wait in Queue (Queue Messages) → Talk Time with Associate

Associates

Talk Time with Consumer (by Call Type) → Hold Time → NR or ACW (If applicable) → Outbound Calling

Components of AHT

Average Handle Time (Diagnostic)
"Why Productivity is What it is?"

KPI		TCH
Diagnostic Metric		AHT
Supporting Metric	Talk Time	Hold Time	After Call Work

NOTE: Some Call Centre Platforms allow for programming 'automatic ACW' (after call work).

Schedule Adherence – Centre and Agent

Schedule Adherence

- **Schedule Adherence:** Total time % agent is available (logged-in) to scheduled time.
- Adherence Target = 85% - 90%
- Personal Work Discipline
- Impacts TSL, ASA and Abandon

In Summary: Essential EFFICIENCY Metrics?

Efficiency / Productivity	Organization	Centre	Agent
Contact Volumes (by interval)	X	X	
Service Level	X	X	
Response Times (Email/Web Chat)	X	X	
Abandon Rates #/%	X	X	
ASA – Average Speed of Answer	X	X	
True/Normalized Calls per Hour		X	X
Average Handle Time		X	X
Schedule Adherence		X	X

Efficiency or Productivity Metrics

Personal Work Discipline

EFFECTIVENESS or QUALITY and CUSTOMER SATISFACTION

Let's Break This Down!

What are the Essential **EFFECTIVENESS** Metrics?

Quality or Effectiveness

Quality Assurance

Go Beyond Completing a Checklist

- Hear what customers are saying
- Understand what employees experience
- Learn how to make it better

Why Monitor?

1. Validate an employee's contact / transaction handling expertise
   - Knowledge
   - Skills
   - Adherence to process and procedure

2. Assess customer satisfaction with the company's promises, processes, policies and procedures.

✓ Proactively identify and correct broken processes or procedural flaws

✓ Anticipate customer needs and concerns

✓ Capture business intelligence

✓ Empower employees to use their skills, knowledge and expertise to resolve customer needs, issues and concerns

✓ Enhance the Customer Experience

Internal Quality Metrics – ESCALATIONS

ESCALATIONS – Service Recovery

- ◦ Track, Trend, Analyze and Action
- ◦ Why/When/Who
- ◦ Individual Performance – trends, coaching opportunities
- ◦ Organizational Performance – root cause/continuous improvement

Essential **QUALITY** Metrics - Internal Quality Assurance

INTERNAL Quality Metrics:

- Call Monitoring Scores

TEST: Do your internal quality scores correlate with your Customer Satisfaction and Loyalty scores?

1. Set Clear and Specific Quality Performance EXPECTATIONS
    ◦ Define and Document Quality

2. Establish an EVALUATION process that is fair and objective
    ◦ Knowledge/Resolution/Compliance
    ◦ Communication/Interpersonal Skills
    ◦ Documentation/Fulfilment

3. INFORM and report out to Management, Centre and Agent

4. EDUCATE & COACH to drive sustained performance improvement and/or reinforce behaviours

SURVEY SAYS ... ?

EXTERNAL Quality Metrics:
- Customer Surveys

ASK YOURSELVES:
Do you focus on reducing customer effort, or increasing your promoters?
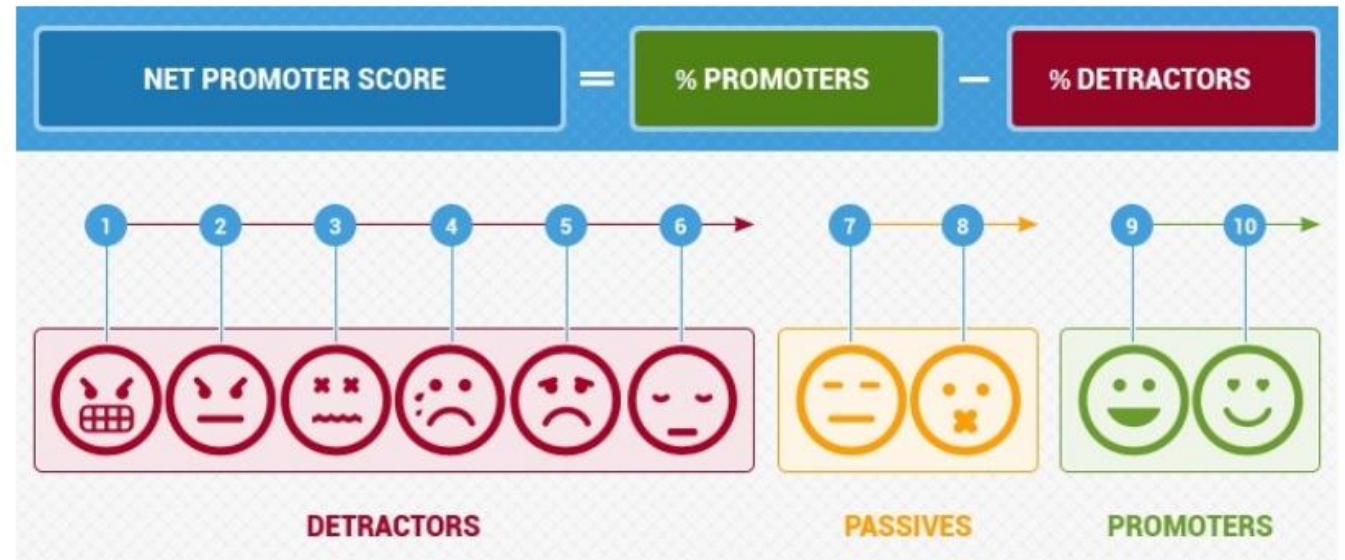
SURVEY SAYS ... ?

Net Promoter Score (NPS) focuses on the relationship between you and your customer.

- **NPS** – an index measuring the willingness to recommend products/services. Used to gauge customers' overall satisfaction and loyalty to your brand.

NPS QUESTION:
Considering your complete experience with our company, how likely would you be to recommend us to a friend or colleague?
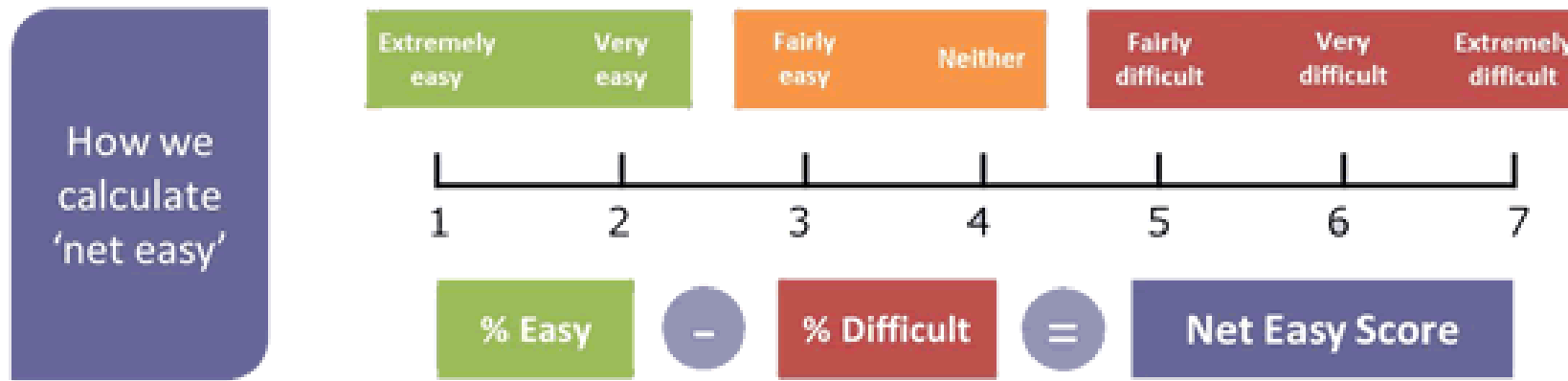
SURVEY SAYS ... ?

Customer Effort Score (CES) focuses more on the experience and customer satisfaction.

- **CES** – assesses the link between customer satisfaction and loyalty based on the effort a customer must exert to get their issue resolved.

Overall, how easy was it to get the help you wanted today?

In Summary: Essential **QUALITY** Metrics?

QUALITY Measures	Organization	Centre	Agent
Internal – Quality Score	X	X	X
Internal – Accuracy		X	X
Internal – Escalations		X	X
Internal – First Call Resolution	X	X	
External – Customer Satisfaction	X	X	X

TURNING STRATEGY INTO ACTION …

Operational Strategy & Goals

- Improved Customer Experience
- Increased Revenues
- Cost Containment
- Improved Profitability

KPI / Performance Metrics

- Efficiency Metrics
- Quality Metrics
- Customer Sat & Loyalty
- Revenue Results
- Balanced Agent Score Card

Reports / Data Sources

- Telephony / ACD Reports
- QM System
- CRM / Technology & Programs
- Internal Management Reports
- CX Surveys

What Employees Want/Need …

GUIDING PRINCIPLES:

1. To know in clear and specific terms what is expected of them

2. To know how they are performing, on a continuous basis

3. The opportunity to develop their knowledge, skills and expertise

4. A sense of purpose and belonging

Measuring Performance – at the Agent Level

Humanism at the Helm ~

"Using call management reports and electronic monitoring systems is good practice; using them in excess to replace effective, humanistic coaching and management practices is not. We've all heard that to be a good Manager, Supervisor, or Coach, you have to **"focus on the people"** but doing so doesn't mean focusing on their every move. Rather, it means setting them up for success by educating them and creating an environment where they feel inspired to show off what they know."

Source: Call Center Magazine

Final Thoughts …

- If you don't *measure* it, you can't *manage* it.
- If you don't *measure* it, you can't *improve* it.
- *Inspect* what you *expect*.
- Just because you *can* measure it, doesn't mean you *should*.

Thank You

Any Questions

The Impact of AI on Customer Experience Webinar

- **September 27, 2018**

- **2pm EST**

- **Guest speakers: Shai Berger, CEO Fonolo; Kevin Hornidge, Sr. Director RBC and Flavio Pereira, CEO Nuveo**

- **Register at www.gtacc.ca**