



Assessing your center: A strategic imperative to becoming the “best”

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Contact center professionals are always wondering what the best centers do – whether metrics, technology, processes, organizational structures, or facilities. It is a rare center that excels in all areas, yet the “best of the best” have high aspirations. An assessment puts your center on the path to improving key areas that benefit your company and your customers.

An assessment takes a careful look at your contact center environment and analyzes its ability to deliver on business and operational goals – whether your focus is service, cost management, or sales. We believe today’s economic environment heightens the need for an assessment to ensure the center achieves its potential and delivers business value.

What are the *best practices* against which you’ll assess performance? Contact center benchmarking studies are one input, but you need to take them with a grain of salt. They often report on what the masses do rather than what the “best of the best” do. (*And who wants to set the bar at “average”?*) Further, variations on definitions can cloud their meaning, especially for metrics. The better input to best practices is what top centers do, what the industry offers, what customers expect, and what comprises a successful customer experience while also optimizing the business operations for cost management, service delivery, and revenue protection or generation.

Your assessment must also consider the unique characteristics of your business and CC environment, as well as your strategic goals. Centers are not equal in size, vertical industry, customer base, budget, resources, or support functions. They aren’t driven by the same factors nor are they trying to achieve the same business goals. So an assessment must consider the *unique practices* that influence this center. The result is that the outcome ensures alignment of your center’s technology, operations, organization, and metrics with the business strategy, goals, and drivers.

Valuable assessments have a number of other characteristics. They are penetrating and objective. They address the following six categories: strategy, operations/processes, organization, technology, metrics, and facilities. They consider front-line and support functions. And, they drive out an action plan or “roadmap,” not just a scorecard of where you are good or bad.

The assessment process has several critical steps:

- **Discovery:** Discovery starts with understanding your world today through current state observations. Part of that discovery includes clearly defining the business and operational drivers – strategy, directions, and goals. You must also explore the underlying strategies, such as technology strategy for the enterprise or the contact center. As a result of exploring these various elements, you will understand how the strategies align or don’t align, pointing to an opportunity. Finally, discovery includes unearthing those best practices and what is possible so that you understand what other organizations do, what technology can do, and what can help enable your center to achieve its goals for delivering good service, managing costs, and/or driving revenue.
- **Assessment and analysis:** Discovery provides the context for assessing and analyzing the center. Then you must review the current state, identify the vision based on business and operational goals and



requirements, and identify gaps between the current state and vision. This preliminary analysis defines opportunities to improve. From there, an assessment drives out recommendations to close the gaps, considering the realities of your business. Often recommendations pose options with tradeoffs, because there is no “perfect” solution. The next step tackles those tradeoffs to finalize the plan.

- **Develop and document the action plan or roadmap:** In this step, those conducting an assessment sort through the options and tradeoffs to finalize recommendations and develop the full plan. They will also consider the timing and phasing of the various initiatives, considering factors such as: budget, resources, timelines, pain points, return on investment, other initiatives and the associated resource demands and change implications, dependencies, etc. This step solidifies the recommendations into the plan, with actions and timing in various categories. Once documented, the team can seek approval and hopefully pursue execution soon.

Over the next few months, we will provide a series of articles that talk about the six assessment areas and address:

- What does the scope of this area entail?
- Why assess this area?
- What should you look for?
- Common things we find in assessing this area
- Some best practices to consider

We hope that this series triggers assessments that drive actionable plans for improvement. Then we will all experience more of the “best” of what customer interaction has to offer.

Follow this link to a list of “best practices” we have developed from working with many centers:

http://www.strategiccontact.com/pdf/bestpractices_v6_1006.pdf