



Becoming the Best: Assessing your Metrics and Reporting

By Lori Bocklund, President

The National Association of Call Centers | Volume 5, Issue 1, January 15, 2010

Since call centers have been around for decades, you might think that an article devoted to assessing metrics and reporting would be unnecessary. After all, every single piece of technology in the center spews out gobs of reports! In truth, the sheer quantity of data is mind-numbing. It's hard to zero in on the right metrics, package the data in a way that's useful, and produce information that leads to actionable and valuable outcomes. And it only gets worse as we add more media, technology and complexity to the center's operations. While I could write a whole series on this topic, I'll try to capture some of the high (and low) points to get you started on your assessment.

Defining the Scope of the Assessment

Metrics and reporting is much more than Key Performance Indicators (KPIs) and the familiar set of real-time and historical reports produced by your ACD. It's the means through which you analyze business processes from end-to-end and measure the impact of your operations on customers, staff and the bottom line. As such, your metrics and reporting assessment must look at all media and all forms of contact – voice, voice mail, email, chat, IVR and web-based services. It might encompass links to outcomes in CRM, analytics, quality monitoring and customer satisfaction surveys. And it considers how contact center information is supplied to, and used by, the rest of the enterprise to measure the center's value as a strategic asset.

Common Metrics Issues

We've encountered a common set of problems as we've worked with contact centers around the country. As I list them below, they'll probably get you nodding your head or chuckling with familiarity. The best practices listed at the end of this article provide remedies to these problems.

Issue: Metrics appear to be "plucked from the air" without a clear relationship to the underlying business model. Examples: An executive sets the bar for service levels without a staffing model that makes the target attainable. A benchmarking devotee chooses categories and targets based on "industry standards," disregarding the distinct nature of the center's business. Agents are rated based on "calls per hour" even though they don't control call volumes or overages/shortages in staff to support it.

Issue: Metrics focus internally and don't resonate outside the contact center. Example: The Contact Center executive wants to elevate the stature of the center among her peers, but all she can talk about is service level, AHT and abandon rate.

Issue: Managers select metrics or establish targets that produce detrimental behavior. Example: Agents get marching orders to reduce their AHT, which they dutifully do, but first call resolution, quality and customer satisfaction all suffer.

Issue: Management talks from both sides of its mouth. Examples: "We're very customer focused. We want to deliver the best service possible." Or: "We want our reps to talk to customers about our new products/services." But performance reviews are weighted heavily toward AHT.



Issue: The company purchases sophisticated analytics and scorecard tools but doesn't invest the time and energy to use them properly. Example: Management is all excited about the promised ROI they'll realize when the new tools go into effect. But they didn't plan for supervisor time or coaching methods to work with reps based on the results. And no one takes ownership for changing the dysfunctional processes, improving systems navigation or performance, or making adjustments to training in response to the tool's analytical insights. They wind up with more reports, not better results.

Issue: Home-grown spreadsheets and databases are the refuge for people with inadequate and/or misunderstood tools. Example: A small army manipulates data in complex spreadsheets; "Joe" creates the vital daily report. The custom reports and manual processes are hard to scale, create an atmosphere of distrust and the potential for errors – while being a very expensive way to generate useful information. Everyone worries about what will happen if Joe moves to Tahiti.

Issue: IT manages system reports and CC Operations manages people reports, but never the twain shall meet. Example: IT notices a drop in IVR performance and begins working to resolve it, while the center fails to meet its service level for the day through no fault of its own.

Apply Best Practices to your Metrics and Reporting

The key to success with metrics and reporting is to align the metrics with corporate and organizational accountabilities, define achievable metrics and ensure that they drive appropriate behavior. Use these best practices as you assess your metrics and reporting:

- Metrics are defined in support of the business goals, and accountability is well defined and aligned within the center and its support partners. Make sure IT is part of the equation and that proper lines of communication are in place.
- Everyone understands the goals and can achieve them. They have access to appropriate information to manage performance. Use benchmarking as one input, not the whole story.
- Metrics include a few key items with targets, while other items critical to success are monitored for trends or anomalies.
- The center has a balanced view of performance across efficiency/productivity, customer experience, employee satisfaction and financial performance using metrics such as service level, handle time, utilization, adherence, quality scores, customer satisfaction, turnover, cost or revenue measures, self service rate, first call resolution rate and technology performance.
- Tools, processes and qualified resources are in place to assess performance and take action to optimize operations – tactically and strategically. [Note: You need the people, process, technology triumvirate to succeed with any performance tool.]
- Accountabilities are aligned, with senior staff focused on strategic goals while the staff in the trenches manages day-to-day operations.