



Technology Optimization Part 2: Reporting

By Lori Bocklund, President

The National Association of Call Centers | Volume 4, Issue 8, April 17, 2009

If I were to poll a cross-section of call center leaders, I'd probably find a love-hate relationship with reporting software. They love the technology for cranking out tons of data and reports. But they're not crazy about how difficult it is to find the meaningful information among all that data. Since reporting is the key tool for assessing the health of the center and identifying areas for improvement, and one nearly every center invests in, let's talk about how to get the most out of that investment.

First, I hear and appreciate the frustration with many vendor reporting packages. One hundred or more standard reports can be overwhelming. It's tempting to provide access to lots of reports for fear that a useful insight might otherwise be lost. It's equally tempting to avoid the overload by using a few reports for a few simple things or worse, the wrong things, thus missing the opportunity to create focus on the business goals. Apparently the strongest temptation, because we see it so often, is dumping data into Excel or Access, presumably to get it into a manageable form in a familiar tool. The latter may "work," but it's not a good long-term strategy.

It pains me to see clients spend tens if not hundreds of thousands of dollars on management reporting packages to accompany their routing and skills capabilities, and then deploy small armies to manipulate data in spreadsheets. Beyond the obvious hit to the bottom line, it's a time-intensive, error-prone coping mechanism that doesn't scale. The mysteries of these one-off reports result in second-guessing and data distrust, and sometimes independent calculations that reap different results. Heaven forbid one report (which we've even heard referred to by the author's name, such as the "Bob Report") from one data manipulation guru – I mean analyst – says something different about a crucial performance indicator than another report.

I'm also concerned about folks who focus almost exclusively on historical reports and the "I know what happened" explanation that comes with it. Real-time reports offer the possibility of doing something about what *is* happening, addressing key performance requirements such as Service Level. Reports aren't meant to be yesterday's news. They are calls to action – both tactical and strategic.

Here are some actions you can take to optimize reporting technology and its application in the center:

1. Define a metrics strategy to focus on the right key performance indicators for your business and operational goals. Then specify what information should go to whom, how often, in what form, via what channel. Create a consistent focus across the organization and use reporting to reinforce and optimize performance. *[Stay tuned for a discussion of scorecards and dashboards in my next column.]*
2. Create a business analyst role to maximize the value you get from your real-time and historical reports. Define "triggers" to address performance issues in real-time along with appropriate action plans. Use trending and analysis to define strategic changes in processes, staffing, technology use, and more. Work with routing and skills analysts, quality monitoring staff, training, and IT to institute changes and track results.
3. Use the systems on which you've spent the big bucks. Invest in training so your people know how to use the tools and customize only when necessary. Make sure your front line supervisors and managers work effectively with the information they receive. And help CSRs understand how the information can help them balance productivity with quality service to the customer.



4. Define governance for report creation and distribution to avoid becoming slaves to the system and constantly creating unique, little used reports. Have a business reason for creating new reports, adding new metrics (more is not always better), and distributing more information to more people.