



Technology Optimization Part 3: Scorecards and Dashboards

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Scorecards and dashboards present a tremendous opportunity to focus everyone in the contact center on what truly matters to the business. In the best case, the technology and associated processes operate like a nervous system, sensing and reporting key information about the current environment and stimulating coordinated action by all affected parts. In the worst case, they fire off the wrong responses, overwhelm the receptors with too much information, fail to warn of impending danger, or some combination of all three. There's no doubt about it: It makes good "sense" to give thoughtful consideration to the design, presentation, and use of this technology.

Whether built in-house or purchased off-the-shelf, scorecards and dashboards provide a "snapshot" of performance for the organization, teams, and individuals. In their most basic form, they provide daily, weekly, and/or monthly views of key metrics, as well as real-time displays for selected operating statistics. Higher end solutions use color coding to compare actual performance to targets and highlight trends. They equip users to slice and dice the data and/or drill down for additional detail. And analysts, team leaders, supervisors, and CSRs get custom views on their desktops tailored to their specific needs.

As cool as they are, scorecards and dashboards can get muddled up by technology, process, and people issues. Home-grown solutions fall prey to the too-much-of-a-good-thing syndrome in which more and more data gets crammed onto scorecards with little regard to the stats that really matter. And with the high risk of human error that comes with this kind of reporting, unsuspecting users may get too-much-of-a-bad-thing! Vendor tools have their own Achilles heel: poorly *applied* bells and whistles due to lack of strategy and context. No matter who does the development, some common threats are:

- Poorly defined Key Performance Indicators (KPIs) which lack context within business strategy
- Limited diversity in the scorecard data – mostly repackaged ACD stats, perhaps with a dash of QM – which fails to account for voice of the customer, IVR performance, schedule adherence, cost/revenue numbers, and other KPIs.
- Too many KPIs ("*Just measure them all!*") and/or conflicting KPIs with little concern for how the data drives – or fails to drive – performance.
- General confusion by the team about what the metrics mean, why they're important, and what the team should do about them, compounded by an absence of coaching to stimulate peak performance.

If these pain points sound familiar and you've got a hankering to enhance your operational nervous system, here are some suggestions for optimizing your scorecard and dashboard technology and its application in the center:

1. Develop a metrics strategy tailored to your primary business objectives such as revenue generation, cost control/efficiency, or relationship building. Identify a few targeted KPIs that have particular relevance to your objectives. Measure staff productivity across all media and the efficacy of customer-facing technologies such as IVR. Distinguish between metrics with specific targets and those to simply monitor for trends and anomalies. Finally, define who gets what, with what frequency, and through which media. As shown in Figure 1, a good strategy provides folks in the trenches with frequent, granular data, while senior management's role is to understand the

“big picture” and resist temptation to dive into the weeds. A strategy provides the focus and alignment everyone needs to do their part.

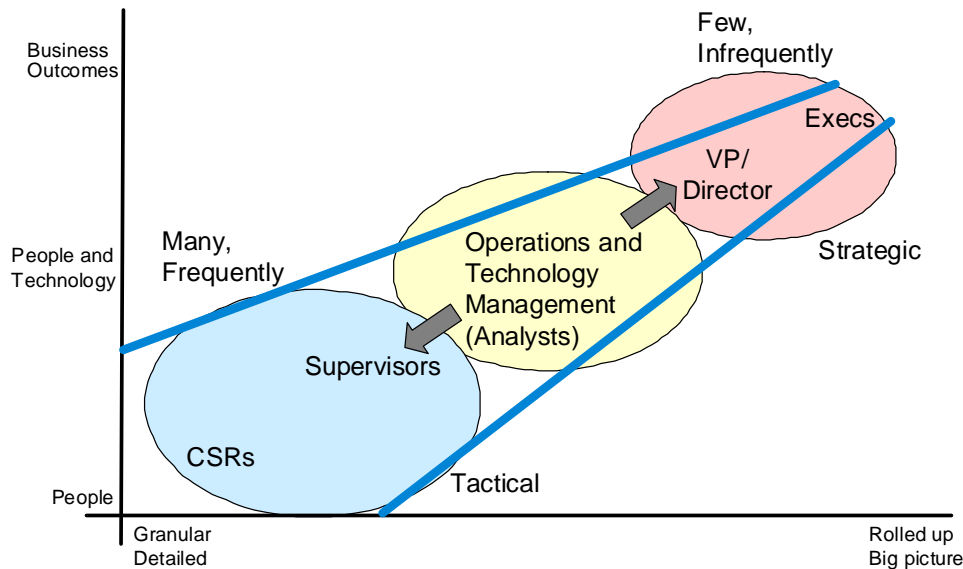


Figure 1: Each function has a different role in using performance data

2. Choose the *right* data from the *right* sources to create a balanced view of the center’s performance, along with each individual’s contribution to the collective. Paint a comprehensive picture, but don’t inundate the viewers with too much information.
3. Take time to educate the team on the metrics strategy and how it relates to the center’s business objectives. Communicate how and why the metrics were chosen, what they mean to the center and the individual, and how they’ll be used to monitor and enhance the team’s performance.
4. Create business processes to specify who does what under what circumstances with information provided on scorecards. Address real-time operational protocols to meet critical metrics such as service level. Provide opportunities for feedback, coaching, and personal development to help individuals raise their skills and competencies. Note trends and root causes that affect the whole organization and engage the training, IT, and process optimization folks to launch performance improvement initiatives. Use results to recognize individual and team successes.