

Contact Center “Best Practices”

Many strive to improve their contact centers and seek guidance on what the “best” centers do. There is no single recipe for success, as each center must fit into its business context and address the defined goals, while balancing the tradeoffs created by cost and resource constraints. However, we can all learn something from others, and work towards “best practices” wherever possible.

In the spirit of encouraging improvement in centers, the list below provides some brief thoughts on contact center best practices based on our observations of many centers in many different industries. Each category has many elements, so this list merely highlights some of the important practices for today’s centers. Use this list to stir your thinking on how to improve your center.

Strategy: Contact Center’s strategy is aligned with and supports the business strategy

- Business strategy is clearly defined, communicated, and understood by staff
- Contact Center positioning in the corporation is consistent with its role in achieving business goals, and is well communicated
- Relationships between the center and other parts of the business are appropriately defined and maintained
- Operational practices are consistent with and contribute to achieving goals and include accountability, sourcing, disaster recovery, channel and self service strategies
- Technology strategy is aligned with and positioned to enable operational and business success, and includes architecture, sourcing, accountability, and governance

Processes: Processes are properly focused and designed, consistent with strategy

- Processes are well defined, reinforced, and consistently executed – for contact management, as well as support functions (e.g., quality assurance, hiring, training, workforce management, technology application/support, reporting and analytics)
- Center access (hours, numbering plan), contact routing (including menus/prompts), and skills use consider customers first, while balancing the needs of the business and the center
- Processes are designed to ensure customer expectations are met and operations are efficient and effective; the end-to-end experience is considered, even when other departments play a role in addressing customer needs
- Continuous process improvement initiatives are in place to ensure ongoing optimization

Organization: Organizational structure provides the appropriate numbers and types of resources to achieve goals

- Roles, responsibilities, and accountabilities are clearly defined – within the center, and with support areas that the center relies on (e.g., IT, Marketing, HR, analysts)
- The organizational design enables strategic planning and execution while also addressing the day-to-day demands of operation
- The organization offers appropriate opportunities for growth and development, and incentives, rewards, and recognition

- Sourcing and hiring approaches are effective and aligned with business goals, deliver appropriate staff levels with the proper skills, and retention is optimized
- Established and proven feedback processes and procedures are applied consistently and fairly across the organization
- Strategy, goals, and outcomes are clearly communicated across all levels of the organization

Metrics and Reporting: Metrics are aligned with accountabilities, achievable, and drive appropriate behavior

- Metrics are defined in support of the business goals, and accountability is well defined and aligned within the center and its support partners
- 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
- Everyone understands the goals, can achieve them, and has access to appropriate information to manage performance; accountabilities are aligned, with senior staff focused on strategic goals while the staff in the trenches manages day-to-day operations

Technology: Technology tools are in place to enable the operation to serve its mission

- The company is not over-invested or under-invested for the role of the center in achieving its goals, and the resources (human and financial) available
- Technology is properly applied to business needs, considering the user experience (internal and external)
- Business and IT work together to optimize technology – from planning through implementation and ongoing support
- Solutions are sought and implemented in line with enterprise architecture, standards, integration, and sourcing strategies, while addressing the unique needs of the center
- All users have a clear understanding of the appropriate use of the tools through training and reinforcement

Facilities: Facilities and physical environment support business goals and employee health, safety, and productivity

- Sites are easily accessible to employees by public and private transportation, and ample parking is provided
- Work areas are ergonomic and promote teaming and resource management while avoiding disruptions; support areas such as training, quality review, huddle, and break areas are adequate
- Amenities (food, exercise facilities, daycare, etc.) are available on-site or nearby
- Appropriate space is provided for display of operational feedback and recognition