

MEASURING AND ACHIEVING FCR

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A look at tools that can play a key role in reaching your FCR goals.

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Many contact centers have a big goal: Increase first-contact resolution (FCR). Leaders know it can improve efficiency, lower costs, provide a better customer experience. What's not to like?! Unfortunately, it can be hard to measure and hard to achieve.

Let's look at how technology can help on both fronts.

Measuring FCR

In an ideal world, FCR metrics reflect the *customer's perspective*. They capture the center's ability to resolve the customer's inquiry within each channel as well as track movement across channels. They establish links across multiple contacts if it takes more than one interaction to put matters to rest. And the underlying calculations are immune to any mathematical manipulation that might render the center's performance artificially high.

In the real world, FCR measurements are tough nuts to crack. It takes ingenuity to glean meaningful insights from metrics that are scattered across multiple systems. It takes integrity to ensure that the calculations accurately capture the reality of the customer experience, especially if they might reflect poorly on the center. And it takes a discipline to track these figures over time and make adjustments as better tools and techniques

become available. And it was hard enough to do it all right with just phone calls; now centers must consider emails, chats, text/SMS and more!

Many centers simply throw in the towel in the face of all these hurdles. Others proceed with approaches that are either forced or flawed. Yet a quick review of potential methodologies reveals opportunities to gain useful insights, while also highlighting some cautions based on the imperfections of each.

One simple technique has customer service reps end calls with the question, "Have I addressed all of your needs today?" Reps capture responses in a desktop application, Excel spreadsheet or portal. This approach offers the opportunity to correct omissions or handle other concerns before bidding farewell. However, it relies upon honest reporting by the customer and the rep. The

customer may not know whether or not things have been resolved at that moment, or may simply want to move on. The rep may not have visibility into the customer's prior interactions, and certainly can't

know what may happen after the interaction. And, of course, if incentives (or penalties) are in play, the rep could lean toward generous interpretations of contact disposition.

Agent bias can be overcome by including FCR in quality monitoring reviews. When listening to call recordings or doing side-by-side

monitoring, QM analysts or supervisors look for the right confirmation from agents and customers at the close of the contacts. They apply pre-specified scoring to that element of the call to facilitate individual, team, group and center reporting. As before, this approach may not capture customer activity prior to the current contact, and clearly lacks visibility into follow-up contacts. It also relies on a large enough sample size to make reasonable inferences about overall performance. Speech analytics may be able to automate this process and generate a sufficiently large sample size.

For those who prefer hard numbers, system-generated statistics hold great appeal. If call transfers are the only way that the center misses the mark, then FCR appears to be an easy calculation (100% minus the number of transferred calls divided by the total calls). However, if there are repeat calls or callbacks, then those contacts must be included along with the transfers. The data may be available via phone records, workflow tools and/or CRM contact records. Phone records can be problematic when customers use multiple lines to contact the center (or call on a different issue!). Tracking in workflow and CRM tools can be dependent on agent adherence to processes like capturing every contact or opening and closing cases. And, of course, the center must determine the time interval to reasonably assume that customer interactions could persist on a given issue: hours, days, weeks or longer.

Consistent with a preference for the cus-

In an ideal world, FCR metrics reflect the customer's perspective.

customer perspective, surveys may be useful for tracking FCR. An IVR application, follow-up email with a link to an online survey, or performance management application could ask customers if their issues were resolved or if it took more than one agent interaction for completion. Surveys can be issued immediately for transactions with clear outcomes—e.g., order placed, status provided, transaction completed. Some delay can be inserted if the mix includes more complex interactions or a clear trigger for follow up. These delayed options are generally via email or a call, and are often conducted by a third party. Of course, delays pose the risk that customers will either forget the details of their interactions or be disinclined to participate. Any survey may fall prey to a self-selection bias, perhaps attracting the cranky customers and losing the satisfied ones who are too busy to offer feedback.

Bottom line: There are a variety of contact center tools that can play a role in measuring FCR. You need to determine the best fit for your center based on your customers, contact types, available technologies, budget and resources (IT, contact center support, management). Given the pros and cons of each option, the solution might be a multipronged approach that spans internal and external views while providing checks and balances on the captured data.

Whatever approach you choose, make sure you can produce reports consistently at both the individual and group levels. Set a baseline one you've stabilized with your methods and metrics, and then work toward incremental improvements. Look for trends to see if there is a need for training, system changes, process improvements, or knowledge base updates or additions. Look for opportunities to provide coaching and development at the individual level to bolster confidence and improve performance.

Achieving FCR

Now that we've talked a bit about measuring FCR, let's look at tools that may help you achieve (or improve) FCR. As usual, these tools go hand-in-hand with good processes and the right



contact center support and IT resources to use them effectively, across all channels.

It starts with getting contacts to the right resources through well-defined, easy-to-understand **prompts and contact routing**. If contact complexity or diversity argues for skills-based routing, make sure you define agent skills with an eye toward FCR. If you over-segment, customers will get so confused that they'll go to the wrong pool or simply bail out of the prompts in favor of the general group. While the universal agent approach sidesteps this issue, the center must provide training and tools (e.g., KM, desktop) to help agents succeed. Context-based routing bridges the gap between these approaches by leveraging data about the contact, the customer, the situation in the center, etc., to customize prompting and route customers to the right resources.

Once a contact gets to an agent, the biggest opportunity for improving FCR is **knowledge management**. Success depends on getting the fundamentals right—specifically, a well-designed search engine that yields a manageable size of results leading to targeted information and clear guidance for action. It also depends on processes that keep the content fresh and relevant. Feedback/ratings and workflows ensure outdated content goes away and the most useful information rises to the top. Agent participation provides valuable insights on what's working and what's not, and where information gaps hinder FCR.

Collaboration tools can play a big role in promoting FCR. Things like instant messaging (IM) (e.g., Skype for Business) and now, persistent collaboration spaces like Slack, provide service reps with the ability to tap other resources while remaining the focal point for customer interactions. Some companies use the principle of "swarming" for accessing a group of skilled resources for better, faster, FCR. This approach is gaining traction for tech support (e.g., help desks) as it breaks down the traditional tiered model.

CRM provides customer context that may be used in routing, gives agents the backstories on situations they face, and offers guidance on what to do through scripts or business rules. Contact history notes can prove especially valuable if they are concise, consistent, well-organized and easily digestible.

Other Metrics Shed Light on FCR

Whether you have decided to measure FCR directly or have yet to dip your toes in those waters, there are a number of other ways to see what's happening with your contacts on the first touch.

TRANSFERS, CONFERENCES AND CALLBACKS are fairly obvious indicators that calls are not getting to the right persons the first time to resolve issues.

Really short and really long **HANDLE TIMES** should be flagged. Short calls can suggest a quick transfer; long calls might indicate struggles to resolve a situation. Likewise, excessive **HOLD TIME** could reflect time spent in consultation with others or digging around for answers. Lengthy **WRAP TIME** might mean that agents are writing detailed notes for others when/if their customers call back.



If you have a **WORKFLOW TOOL**, take a look at the types of contacts that escalate, by whom and to whom. Reports from **IM AND COLLABORATION tools** may also reveal incidents in which customer inquiries fall outside agent skills and knowledge. Make sure you go beyond the numbers. Find out what's being discussed and devise strategies to equip agents to handle those cases independently.

A **unified agent desktop (UAD)** can make it easier for agents to learn the ropes while providing tools to navigate seamlessly across back-end systems and process tasks faster. With a well-designed UAD, agents don't give up as easily on unfamiliar inquiries, making it less likely that they'll transfer or escalate the more challenging contacts.

Achieving FCR for Self-Service

When customers use self-service applications, they want and expect FCR. As such, it's imperative that these applications

Many Technologies Can Play a Role in FCR

MEASURING FCR	ACHIEVING FCR
<ul style="list-style-type: none"> • Agent captures outcomes in desktop application • Quality Monitoring Scorecard element • Calculation based on contact outcomes (e.g., transfers, escalations, callbacks) • Calculation from contact data (via CRM, phone records, etc.) • Customer Survey 	<ul style="list-style-type: none"> • Prompts and routing • Knowledge Management • Collaboration tools (e.g., IM, persistent workspaces) • Customer Relationship Management • Unified Agent Desktop • With assistance from: <ul style="list-style-type: none"> • Self-service • Artificial Intelligence • WFO tools

deliver on that promise. The apps must be well-designed, and the design team must stay engaged to identify and resolve trouble spots.



Artificial intelligence (AI) is paving the way toward higher self-service success rates. AI “bots” provide a smart and conversational user interface along with an app that provides answers, guides users through transactions, knows when to get a human involved, and finds the right one. While some may be single-channel (e.g., a chatbot), a preferred long-term approach is to have an omnichannel platform that can serve customers via a variety of channels—voice, web chat, text chat, etc. (For more on AI, see “Imagining the Possibilities with AI,” *Contact Center Pipeline*, July 2018.)

Even with the best of intentions and technology, customers may need to leave their self-service apps to seek assistance. Technically speaking, these transactions have

not achieved FCR. Nonetheless, you need to take advantage of what they’ve already done to achieve first (human) contact resolution. The self-service tool must be integrated into the contact center to route the contact to the right agent and pass along any authentication and details about what the customer was doing. This information equips the agent to pick right up where the self-service app left off and hopefully achieve FCR.

Leveraging Support Tools for FCR

While not part of contact handling directly, WFO tools can play a role in achieving FCR by virtue of the insights they provide and their capacity to identify optimal solutions. For example, **analytics tools** (desktop, speech, text) can be used to profile customer and agent behavior when contacts are resolved and compare that against contacts that fail to attain FCR. This analysis pinpoints opportunities for improvement. As another case in point, desktop analytics could track access to knowledge to see if agents are using the tools,

the frequency of their use, and the impact on FCR.

Beyond its role in measuring FCR, **QM** can be used to unearth the root causes of FCR failures, especially when screen recordings accompany the voice recordings. And, of course **reports, scorecards or dashboards, gamification**, and other performance tools play a role in helping to assess how people are doing, identify coaching opportunities, and motivate people to achieve the defined goals.

Your Journey to FCR

Your customers want their needs addressed quickly and efficiently. They don’t want to be transferred, called back or forced to return another day to start all over again. Your leadership knows that delivering on that customer hope has big benefits for the company.

If you don’t have a clear picture of your first-contact resolution rate, or you aren’t reaching your goals, it’s time to get serious about how you’ll measure and achieve FCR. A strategic planning effort with a crossfunctional team can launch you on the path to success. Include frontline leadership as well as support resources like quality monitoring, trainers and analysts. Take advantage of your IT experts to see how you might adjust use of existing tools or find new ones. Above all, put the customer experience first and consider the pros and cons of various approaches as you determine the best fit for your environment. ●



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