

# Set Your Sights on FCR

Deliver a superior customer experience. Align metrics and technologies around first-call/first-contact resolution.

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**A**s I work with contact centers across all sizes and vertical markets, I hear a consistent theme focusing on serving customers in excellence. So why aren't more customers raving about their experiences? And why do some centers excel in service while others only talk the talk? While there are no simple answers, I can offer up one differentiator that separates the "best" from the rest. Top centers take First Contact Resolution (FCR) seriously and align their metrics and technologies around it to deliver a superior customer experience.

### It's Not Just about Phone Calls Anymore

While FCR started as first-call resolution, it has evolved to reflect contact effectiveness in whatever channel (calls, emails, chat, mail, etc.) customers choose, and whatever teams they contact (see Figure 1 on page 3). The definition can vary based on the applications served. For straightforward transactions, FCR generally presumes *resolution with the first person assisting the customer*. In more complex environments, *resolution may involve a transfer to a subject-matter expert (SME)*. However defined, agents and/or SMEs must be equipped to resolve questions or issues without the need for follow up, and management must drive the operation toward continuous improvement.

Just five years ago, FCR wasn't even considered a top center-wide KPI. Now it sits aside metrics such as service level, quality and customer satisfaction. In fact, top-performing centers diligently focus on FCR in their balanced scorecards. Kudos to customers who demanded contact centers consider the customer experience. And kudos to the management teams that have reaped the cost savings that a high FCR makes possible!

So how does a center measure and achieve FCR? No one process or technology ensures success. Your people need adequate training and access to knowledgeable resources (human and system). You need better reporting and analytics to track performance. And you need accurate, relevant, timely customer feedback. All of these things depend on enabling technologies to deliver results.

### Measuring FCR

If you're going to commit to FCR as a strategic KPI, you've got to establish a credible measurement system to withstand smoke screens, internal resistance, and/or system limitations. This imperative was a tall order a few years ago. It required complex calculation methods to determine if a contact was new or a repeat call. Some technologies to enable FCR success didn't even exist or weren't common enough to be standard in contact centers. Thankfully, the industry and technology have evolved to make measuring FCR much easier. Table 1, on page 4, provides profiles of five measurement methodologies, which could be used alone or in combination. Each has selling points as well as challenges.

You'll need to make a couple of key decisions before you proceed:

- Will you measure FCR using internal, external or both types of input?
- What measurement frequency will you use?

Measuring internally through agent input, your quality monitoring (QM) process or your CRM system delivers *your perception* of FCR success. It may not reflect the customer's experience or, worse yet, leave open the possibility of biased results. When you measure externally by securing your *customer's perception* through surveys, you can get a more accurate FCR picture, but you rely upon your customers' largesse in responding to your queries.

The frequency at which you measure FCR matters. The more frequently you collect the data, the more valuable the feedback in driving the performance and process changes that impact customer satisfaction and operational efficiency.

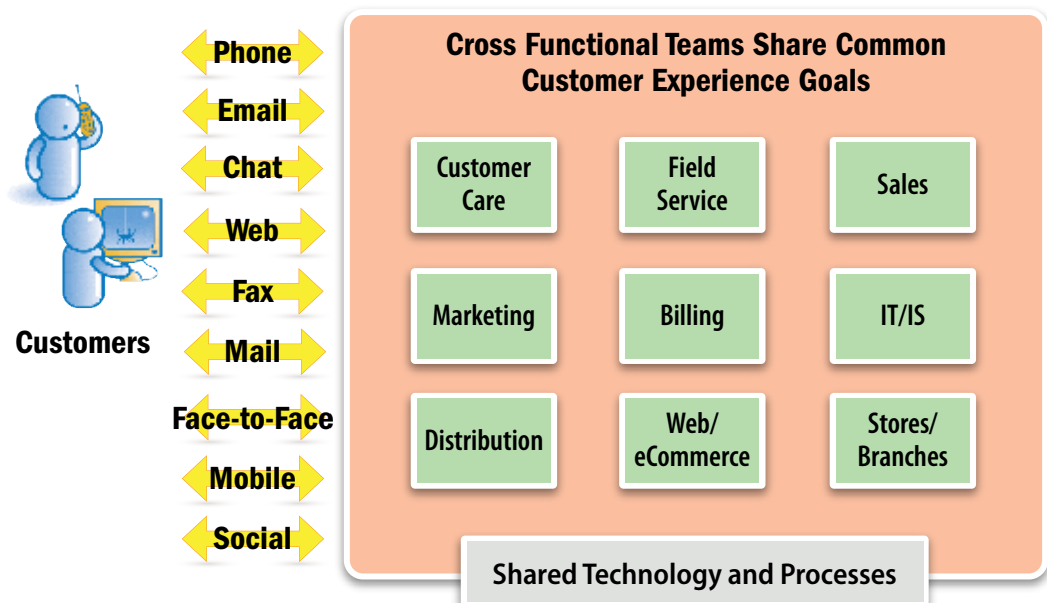
Companies sometimes think they can use a monthly, quarterly or annual marketing survey to gain FCR information. Unfortunately, this approach rarely delivers the requisite value. Questions about specific interactions get buried among requests for feedback on products, marketing campaigns, value or other overall perceptions, willingness to provide referrals, and the like. And if some of us can hardly remember what we did two days ago, how could we expect customers to recall details about interactions that may have occurred a month, quarter or year earlier?

If you want a good result, ask customers, "Were we able to address your reason for contacting us?" as close to the interaction time as possible. You'll increase your response rate and gain valuable feedback for process improvements, agent coaching, or issue trending for other departments. This near real-time request requires technology to automate the process and ensure that it occurs consistently across all channels.

### Technology Enables FCR Success

There are tools to measure FCR, and tools that enable FCR success. Make sure that you know what you're trying to accomplish, so you get the right tool(s) for the job. Whether premise-based or hosted, there are a variety of options.

Customer surveys, QM assessment and customer relationship management (CRM) data analysis are the most common ways to gather FCR data. While you aren't likely to get or change a CRM in your quest for FCR, there are several options for QM or voice of the cus-



**Multichannel and Crossfunction Characterize FCR Pursuit**  
Figure 1, above

tomers (VOC) survey tools. A good place to start is to look at underutilized functionality under your own roof or add-on modules with existing vendors to enable FCR capture. If neither approach proves viable, IVR vendors, performance tool or suite vendors, and a host of service providers would be happy to entertain your inquiries.

Selecting a tool to track FCR is just the beginning. FCR tracking has a ripple-effect on other technologies within the center. They may have a bearing on the FCR measurement process, or they may play a role in enabling FCR in the first place or pursuing the performance improvements that FCR metrics drive. In particular:

- **Automated Call Distribution (ACD)** enables efficient contact routing across multimedia channels (calls, emails, chat, etc.) to appropriate agents based on skills and agent availability.
- **Outbound Dialer (OD)** programs enable automated or live-agent surveying of customer perceptions regarding your service.

FCR TECHNOLOGY	METHOD	PROS	CONS
<b>CSR CAPTURE IN DATABASE</b>	<ul style="list-style-type: none"> <li>▶ Ask customers at close of interactions if their issues were resolved and peg “Yes/No”</li> </ul>	<ul style="list-style-type: none"> <li>▶ Provides direct, immediate customer feedback on their experience</li> <li>▶ Relatively easy to implement</li> </ul>	<ul style="list-style-type: none"> <li>▶ Effective for calls but not for other media</li> <li>▶ Relies upon agent’s integrity</li> </ul>
<b>CONTACT DATABASE</b>	<ul style="list-style-type: none"> <li>▶ Use CRM application and call reason codes for data analysis</li> <li>▶ Deduct duplicates for a specific time period</li> </ul>	<ul style="list-style-type: none"> <li>▶ Leverages very specific calculation using customer contact database</li> </ul>	<ul style="list-style-type: none"> <li>▶ Requires accurate/consistent call reason code tracking</li> <li>▶ Overstates success when repeat contacts occur outside the defined time period</li> <li>▶ Potentially complex and difficult to administer</li> </ul>
<b>QUALITY MONITORING</b>	<ul style="list-style-type: none"> <li>▶ Apply standards for FCR during QM assessments</li> </ul>	<ul style="list-style-type: none"> <li>▶ Independent review by trained QM staff</li> </ul>	<ul style="list-style-type: none"> <li>▶ Only applies to contacts covered by QM</li> <li>▶ Collects data on a relatively small sample size</li> </ul>
<b>SPEECH ANALYTICS</b>	<ul style="list-style-type: none"> <li>▶ Automate FCR assessment through targeted phrases and keywords</li> </ul>	<ul style="list-style-type: none"> <li>▶ Captures customer feedback without bias</li> <li>▶ Can support high sampling rates</li> </ul>	<ul style="list-style-type: none"> <li>▶ Requires significant investment if technology is not already in use</li> <li>▶ Effective for calls but not for other media</li> </ul>
<b>VOICE OF CUSTOMER SURVEY</b>	<ul style="list-style-type: none"> <li>▶ Provide timely survey across all channels</li> </ul>	<ul style="list-style-type: none"> <li>▶ Relatively easy, accurate method for FCR tracking on all contact and customer types</li> <li>▶ Readily available technology or service</li> </ul>	<ul style="list-style-type: none"> <li>▶ Provides sampling data on those willing to participate in survey only</li> </ul>

**First-Contact Resolution Measurement Methodologies**  
Table 1, above

- **Interactive Voice Response (IVR)** applications drive call routing, self-service and post-call automated customer experience surveys.
- **Quality Monitoring (QM)** applications enable organizations to internally monitor agent knowledge and professionalism, in addition to monitoring for FCR.
- **Voice of Customer (VOC)** applications provide external customer perspective regarding agent knowledge and professionalism, and can include FCR questions.
- **Learning Management System (LMS)** is no longer just a tool for HR to deliver and track training. An LMS provides electronic content delivery for product and process training to the agent desktop, furthering agent knowledge and consistency for greater FCR success.
- **Knowledge Management (KM)** enables content from various sources to be linked and displayed as a single information repository, enabling agents to easily access information and provide the right information on the initial contact.
- **IM/Presence** enables frontline agents to access experts or gain fast approvals when needed to increase their initial call success rate.
- **Data, speech or text analytics** enable center management and support staff to identify trends or drill down on individual behaviors, customer concerns, competitive situations or process roadblocks inhibiting first-contact resolution success.
- **Customer Relationship Management (CRM)** systems enable agents to document customer interactions (potentially supporting FCR measurement), review previous interaction notes to minimize the need for customers to repeat their story, or provide pre-approved responses to efficiently and effectively assist. They enable easier contact handling for greater FCR success.

### Pet Peeves...

Leading centers see the evolution of FCR as a primary KPI. However, centers can't focus on FCR at the expense of consistency in reaching service level targets, or fail to leverage existing technology for FCR improvement. Top centers consistently hit their service level targets AND engage in continuous improvement for FCR.

Three common issues I routinely see inhibiting FCR success are:

1. Contact centers assessing only internal quality and thinking they know what their customers experience.
2. Centers with too many metrics working at cross purposes.
3. Centers claiming they can't get customer feedback because they don't have the technology.

These issues can readily be overcome with people, processes and technology working together. Vendors provide many options allowing companies to get FCR-enabling technologies, often at a reasonable cost through the additions referred to earlier, or through service-based solutions. Bottom line: How can any company afford not to focus on their customer's experience in this competitive market?

### Take Action... Now!

First-contact resolution is taking hold as a primary key performance indicator. FCR is critical to enable your company to reduce duplicate contacts for the same issue (save money!) and increase customer satisfaction (drive revenue!).

Here are some key steps as you pursue FCR:

- Define your FCR strategy.
- Start with one channel and then expand to other channels.
- Identify underutilized technology or technology gaps you can readily close.
- Share individual results with agents and key themes with the appropriate departments to enable greater first-contact success.
- Provide positive feedback on improvements to bolster center morale and visibility across the organization.

If you are tracking FCR, great! But ask yourself: Are you getting all you can from this measure? If you aren't tracking it, or aren't getting all the benefit you can, then it's time to take action...now! [D](#)

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### About Contact Center Pipeline

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