



## **Back to Reporting Basics: The Gateway to Analytics**

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These days, everyone focuses on analytics – data, speech, text, desktop, performance, enterprise (CRM), etc. Vendors push technology that delivers it. Analysts say you have to have it. Management wants to see the “so what” of it. Many contact centers are in hot pursuit. However, as with any contact center technology, you need to assess your current state, identify the gaps, and define the appropriate plan. As part of your assessment, consider the following areas:

- ACD Reporting
- Multimedia Routing and Reporting
- Workforce Optimization (WFO) Components
- Location and use of Customer and Contact Center data
- Scorecards and Dashboards
- Available enterprise analytics

### ***ACD Reporting***

Before you consider more complex analytics, you need to get your basic reporting house in order. For many centers, that means learning more about the vendor provided ACD reporting to break the cycle of exporting their ACD data to a central database and using Excel as a report generator. The more reliable, trusted, and scalable approach is to use the ACD’s flexible reporting interface to create and schedule reports, tapping the data when each report is generated. Take the time to learn the tools. You can create custom reports and the associated calculations where necessary.

### ***Multimedia Routing and Reporting***

One of the most common contact center reporting problems is the lack of consistency across media. Most centers take ACD call statistics seriously, but have little visibility into metrics such as response times and handle times for other media (e.g., email, chat, etc.). You need consistent routing and reporting across all media in order to feed analysis of all work performed in the contact center. Success with multimedia reporting starts with robust, and ideally integrated, routing for all media.

### ***WorkForce Optimization (WFO) Components***

Many of our clients have Quality Monitoring (QM), Voice of the Customer (VoC) Surveys, and Workforce Management (WFM). Many use the QM application to record calls but score the calls manually using Excel. Manual scoring loses the impact of QM reporting which links QM scores to specific transactions, consolidates individual and team scores, supports trending and calibration. VoC scores, much like QM, can link to specific transactions and inform deeper analytics. Similarly, WFM system data on metrics such as adherence and occupancy for individuals and teams should be part of your analytics strategy. To benefit from WFO and ultimately analytics, you must collect, integrate, and report on data from each of these solutions.

### ***Location and Use of Customer and Contact Center Data***

Customer data are a primary component of a thorough analytics strategy. Most companies capture customer data through a CRM application and contact center data through the tools mentioned earlier.



However, homegrown CRM or no CRM can mean inadequate customer data collection and reporting, and too often the CRM and contact center data are not integrated.

Analytics requires consolidating all of the data into a single location, or integrating the analytics application with the individual data sources. Before moving into analytics, ensure you understand the location of all customer and contact center data and how each data source will be accessed to support analytics. This effort includes identifying which data fields in each application will be used in analytics.

### ***Scorecards and Dashboards***

An effective first step into analytics is to tap the centralized data discussed above. Agent, team, and center scorecards typically consolidate data from multiple applications and report on that data in a desktop view. Agents can see their performance compared to the team across all key performance indicators.

To move toward analytics, go beyond the Scorecard view and add an understanding of the relationships among the data to drive the “so what” of the consolidated data view.

### ***Available Enterprise Analytics***

The final step as you move from getting your reporting house in order to deeper analytics is to explore available tools and data integration before implementing a contact center specific analytics solution. If you already have an enterprise analytics solution and/or data already consolidated in a central data warehouse, see if you can leverage these tools. If you have or will seek tools targeted for the center, define how those will integrate with your enterprise solutions.

Take the time to assess your starting point and gaps, and develop a plan to move forward. Getting your data and reporting house in order first will ensure a smoother path to delivering on the promise of analytics.