



**ASSESSING YOUR CENTER:  
A STRATEGIC IMPERATIVE TO BECOMING THE “BEST”**

BY  
LORI BOCKLUND, BRIAN HINTON,  
LORI FRASER AND STEVE SUHN

**STRATEGIC CONTACT, INC.**

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## TABLE OF CONTENTS

<b>INTRODUCTION</b>	<b>1</b>
<b>ASSESSING YOUR STRATEGIC ALIGNMENT</b>	<b>2</b>
Why Assess Strategy	2
Strategic Issues and Opportunities	2
Apply Best Practices to Strategic Planning	2
<b>ASSESSING YOUR FRONT-LINE OPERATIONS</b>	<b>3</b>
Defining the Scope of the Assessment	3
Front-line Operations Issues and Opportunities	3
Apply Best Practices to your Front-line Operations	4
<b>ASSESSING YOUR FRONT-LINE OPERATIONS ORGANIZATION STRUCTURE</b>	<b>4</b>
Defining the Scope of the Assessment	4
Front-line Organization Issues and Opportunities	4
Apply Best Practices to your Front-line Organization Structure	5
<b>ASSESSING YOUR SUPPORT FUNCTIONS</b>	<b>5</b>
Defining the Scope of the Assessment	5
Support Function Issues and Opportunities	5
Apply Best Practices to your Support Functions	6
<b>ASSESSING YOUR TECHNOLOGY</b>	<b>6</b>
Defining the Scope of the Assessment	6
Technology Issues and Opportunities	7
Apply Best Practices to your Technology	7
<b>ASSESSING YOUR METRICS AND REPORTING</b>	<b>8</b>
Defining the Scope of the Assessment	8
Common Metrics Issues	8
Apply Best Practices to your Metrics and Reporting	9
<b>ASSESSING YOUR FACILITIES</b>	<b>9</b>
Defining the Scope of the Assessment	9
Facilities Issues and Opportunities	9
Apply Best Practices to your Facilities and Physical Environment	10



## ABOUT THE AUTHORS

Authors Lori Bocklund, Brian Hinton, Lori Fraser, and Steve Suhn are consultants at Strategic Contact, Inc., an independent consulting firm that helps companies optimize the strategic value of their customer contact technology and operations. Visit [www.strategiccontact.com](http://www.strategiccontact.com) or call 866-791-8560.

### Lori Bocklund, President

Lori is a recognized industry leader in contact center strategy, technology, and operations. During her more than 20 years in the call center industry, she has worked with a broad spectrum of systems, applications, and operational environments. She shares her knowledge and experience through speaking engagements, articles, a two-day call center technology course, and the book she co-authored, "Call Center Technology Demystified" (Call Center Press).

Contact Lori Bocklund at [lori@strategiccontact.com](mailto:lori@strategiccontact.com) or 503-579-8560.

### Brian Hinton, Principal Consultant

Brian has extensive experience as an executive manager in businesses ranging from start-ups to multi-million dollar companies. He has been involved in the design, development, application, and support of an activity-based planning and analysis tool for contact centers, conducting many consulting projects focused on process-driven analysis.

### Lori Fraser, Consultant

Lori has over 20 years experience in leading sales, customer service and technical support teams in both the USA and in Europe. Lori combines process streamlining with technology implementation, training and staff career development.

### Steve Suhn, Consultant

Steve is a highly regarded contact center operations professional with 26 years of experience across Airline and Hotel Reservations, Telecommunications, Insurance, Catalog and Retail Sales, Wireless Telecommunications and Data.

## INTRODUCTION

Contact center professionals are always wondering what the best centers do – whether metrics, technology, processes, organizational structures, or facilities. It is a rare center that excels in all areas, yet the "best of the best" have high aspirations. An assessment puts your center on the path to improving key areas that benefit your company and your customers.

An assessment takes a careful look at your contact center environment and analyzes its ability to deliver on business and operational goals – whether your focus is service, cost management, or sales. We believe today's economic environment heightens the need for an assessment to ensure the center achieves its potential and delivers business value.

What are the best practices against which you'll assess performance? Contact center benchmarking studies are one input, but you need to take them with a grain of salt. They often report on what the masses do rather than what the "best of the best" do. (And who wants to set the bar at "average"?) Further, variations on definitions can cloud their meaning, especially for metrics. The better input to best practices is what top centers do, what the industry offers, what customers expect, and what comprises a successful customer experience while also optimizing the business operations for cost management, service delivery, and revenue protection or generation.

Your assessment must also consider the unique characteristics of your business and CC environment, as well as your strategic goals. Centers are not equal in size, vertical industry, customer base, budget, resources, or support functions. They aren't driven by the same factors nor are they trying to achieve the same business goals. So an assessment must consider the unique practices that influence this center. The result is that the outcome ensures alignment of your center's technology, operations, organization, and metrics with the business strategy, goals, and drivers.

Valuable assessments have a number of other characteristics. They are penetrating and objective. They address the following six categories: strategy, operations/processes, organization, technology, metrics, and facilities. They consider front-line and support functions. And, they drive out an action plan or "roadmap," not just a scorecard of where you are good or bad.

The assessment process has several critical steps:

- **DISCOVERY:** Discovery starts with understanding your world today through current state observations. Part of that discovery includes clearly defining the business and operational drivers – strategy, directions, and goals. You must also explore the underlying strategies, such as technology strategy for the enterprise or the contact center. As a result of exploring these various elements, you will understand how the strategies align or don't align, pointing to an opportunity. Finally, discovery includes unearthing those best practices and what is possible so that you understand what other organizations do, what technology can do, and what can help enable your center to achieve its goals for delivering good service, managing costs, and/or driving revenue.
- **ASSESSMENT AND ANALYSIS:** Discovery provides the context for assessing and analyzing the center. Then you must review the current state, identify the vision based on business and operational goals and requirements, and identify gaps between the current state and vision. This preliminary analysis defines opportunities to improve. From there, an assessment drives out recommendations to close the gaps, considering the realities of your business. Often recommendations pose options with tradeoffs, because there is no "perfect" solution. The next step tackles those tradeoffs to finalize the plan.

- **DEVELOP AND DOCUMENT** the action plan or roadmap: In this step, those conducting an assessment sort through the options and tradeoffs to finalize recommendations and develop the full plan. They will also consider the timing and phasing of the various initiatives, considering factors such as: budget, resources, timelines, pain points, return on investment, other initiatives and the associated resource demands and change implications, dependencies, etc. This step solidifies the recommendations into the plan, with actions and timing in various categories. Once documented, the team can seek approval and hopefully pursue execution soon.

## ASSESSING YOUR STRATEGIC ALIGNMENT

An assessment entails a review of the strategic triumvirate – business, operations, and technology. Start by understanding the business strategy and drivers and their impact on the center. Look at your target market and customers, your organization's strategic differentiators, the geography the company covers, and the mission, vision and values and what they reveal about the role of the center. Next, review the operational strategy, which defines the context for the processes, functions, and media the center handles. Finally, test the synergy of the technology strategy, encompassing architecture, applications, IT organization, and technology governance and support processes.

The contact center's strategic options include channel choices, which define the use of media, and sourcing, which defines how you staff and how you procure technology. Site and disaster recovery plans, accountability and metrics goals, and the approach to and funding for budgets round out the key elements to consider. Strategic alignment of the business, operations, and technology strategies is the ultimate objective.

### WHY ASSESS STRATEGY

Strategy is probably the most important area to assess if you want to become your "best." Strategy impacts and provides context for everything else. Further, strategy impacts all major decisions. Without strategic thinking, centers make tactical, isolated decisions, resulting in misalignment with the business goals and often needlessly high costs.

Most centers today would define themselves as a strategic part of the business, and likely have senior executives reinforcing this message. This positioning within the organization points to the importance of assessing and refining strategy. For centers to live up to this billing and its expectations, they must show their value by linking decisions to strategy. Clarity on strategy provides guidance for investment decisions, resulting in simplification of the budgeting process and greater ability to defend budget requests – argument enough for most centers to get on a path to strategic clarity.

### STRATEGIC ISSUES AND OPPORTUNITIES

When assessing strategy, we commonly find some telltale signs that point to opportunities to improve. The first, and perhaps most concerning, is business, operations, and technology strategies that don't fit together – or aren't even clear. For example, we find metrics focused on cost control (handle time, number of calls per hour) but messages to the front-line staff to "build relationships and sell more..." That's a strategic disconnect. Centers may be told that customer service is a strategic imperative, but then lack sufficient budget to provide great service, evidenced in understaffing, outdated technology, or no backup plan. Another common issue is that no one can explain why the center (or IT) use outsourced staff, other than to say it was cheaper, or they wanted headcount off the books.

We often see centers that make tactical decisions without an overarching plan. For example, we've seen centers purchase technology solutions that don't integrate, adding tremendously to the burden of support staff. Or centers establish a text chat or email group that operates on a separate system, using separate people, with no plan to look cohesively at all media as part of the customer experience, or track and report effectively. An inability to assess the value or success of a change often accompanies these tactical decisions. Without a baseline, and without a means to measure the impact, skepticism builds among executives who feel their investments have not achieved the value promised.

### APPLY BEST PRACTICES TO STRATEGIC PLANNING

If these examples ring true to your center, you're ripe for an assessment. Any center conducting an assessment should apply best practices. Our mantra: *The Contact Center's strategy should align with and support the business strategy.* In order to achieve that state, consider these hallmarks of excellence:

- 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, applications, sourcing, accountability, and governance.

## ASSESSING YOUR FRONT-LINE OPERATIONS

Now that we've established a strategic context for a contact center assessment, we turn our attention to your front-line operations – the customer-facing function of your center. This area defines the service you provide to customers, the relationships you develop to solidify future revenue, and/or the direct revenue you generate. Well-conceived front-line process changes – even minor ones – can drive efficiency, improve service, increase revenue, and create synergies with the business strategy.

### DEFINING THE SCOPE OF THE ASSESSMENT

A front-line assessment covers two primary areas – contact routing and contact handling. It begins by considering the dimensions along which contacts are differentiated – by call purpose, product or service, customer segment, customer-specific data, agent skills, time of day, and/or other criteria. It traces the path(s) that each group of contacts takes. It considers all media types, including email, chat, and inbound and outbound calls.

Once the “who, what, why, when, and where” of routing are specified, the assessment proceeds with a thorough review of the handling process for each contact type, including the documentation and training – the “how.” Is the process clear? Is training sufficient for staff to execute each process efficiently, effectively, and consistently? Does the center reinforce processes through monitoring, reviews and metrics? Above all, are the processes aligned with the strategic triumvirate – business, operations, and technology?

Other areas for consideration include self-service and its synergy with agent assisted calls, the center's approach to process design and improvement, agent desktop processes, and messages that agents use to communicate with customers.

### FRONT-LINE OPERATIONS ISSUES AND OPPORTUNITIES

We've noted some common themes when we've conducted assessments that include front-line operations. The quest for information on different contact types often drives centers to go overboard on call routing segments. They capture data through caller responses to menu options when they should use agent-entered codes or built-in logic in the desktop application. Multiple paths through the caller menus wind up routing to the same set of agents – a needless irritant for callers. Moreover, agents carry an excessive number of skills to ensure these over segmented calls get to them. It creates excess baggage in reporting and management and sub-optimizes operations.

On the agent desktop, multiple, cumbersome applications are often required for a single call resolution. Lacking integration, agents “wear out” the copy and paste command keys. It results in high call handle times, increased errors, and frustration for agents. Worse yet, the desktop may not provide ready access to information. This deficiency drives excessive transfers, long handle times, and needless escalations.

Another area to target is routing and handling multimedia contacts. Media silos are far too common. Customers have different experiences on different media channels with email a notorious underperformer (manual routing, no tracking, and therefore no target response time). Agents have no visibility into other media – but they certainly hear about them! A better approach is to use skills for all media and route contacts using a multimedia routing engine. This approach ensures consistent handling and integrated reports which are crucial to planning and staffing.

We also keep an eye out for manual processes that drive inefficiency. Long hold times, long after-call work times, and agents out of schedule adherence are symptomatic of agents trying to keep up with burdensome manual processes.

Finally, it doesn't serve the company if the contact center runs like the wind but drops the baton when handing customers off to other departments. As such, the operations assessment needs to review *end-to-end contact routing and handling* for all media, including contacts that start in self service (IVR or web) and contacts that move on to other departments.

## APPLY BEST PRACTICES TO YOUR FRONT-LINE OPERATIONS

Best practices bring focus to an assessment and the action plan for improvement. Here are some of the hallmarks of a best-in-class center:

- Processes for contact handling are well defined, reinforced, and consistently executed.
- Center access (hours, numbering plan), contact routing (including menus/prompts), and skills 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.

## ASSESSING YOUR FRONT-LINE OPERATIONS ORGANIZATION STRUCTURE

A front-line operational assessments would be incomplete without due consideration of your most expensive and valuable resource – labor. This section provides a framework for assessing your front-line organizational structure to ensure you strike the right balance between efficiency and effectiveness.

### DEFINING THE SCOPE OF THE ASSESSMENT

An organizational assessment takes a thorough look at your work team structure and sizing, and the staffing of those teams. The structural component looks at the grouping of employees across teams, the definition of the job roles and responsibilities within the teams, and the supervisory span of control. Sizing looks at the resources allocated to the workload across those various roles and responsibilities, and whether the organization is properly staffed.

The staffing component looks at where centers secure employees and ensures that the hiring/recruiting approach is consistent with the sourcing strategy. Sourcing can include use of outsourcing, home agents, temps, full time and part time staff, and remote sites to meet daily, peak and seasonal needs. Staff assessment also includes review of compensation, performance management and feedback, rewards/recognition and incentives, and career paths available to staff. These considerations have a direct impact on quality, motivation, satisfaction, and attrition.

### FRONT-LINE ORGANIZATION ISSUES AND OPPORTUNITIES

When looking for opportunities to improve the front-line organization, some common themes emerge. We often discover unnecessarily small, inefficient work groups. The typical motivation for these small groups is supervisor span of control or reporting. While there may be legitimate motivation for smaller work groups, you should be wary of inefficient organizational practices that spark a degree of segmentation that you don't really need. Whatever segmentation is required, ensure you remain as efficient as possible by creating an overflow/backup routing process so available and qualified resources can help busy groups.

A second theme in our assessments is inconsistently achieving service levels due to lack of scheduling flexibility. Most organizations that use workforce management tools effectively analyze staff required in 15 or 30 minute segments. In order to be able to schedule to react to staff requirements at that level of detail, you must have flexibility to alter overall staff numbers. A staff structure with all full-time and fixed shifts does not provide sufficient flexibility.

Another typical issue is excessive attrition. It's a common problem, but your goal should be to maximize retention. One culprit is inadequate coaching and feedback due to overtaxed supervisors. The other "usual suspects" are having the wrong person in the wrong job due to misaligned sourcing, hiring, and recruiting, and job descriptions that are out of date and don't reflect the true nature of the role. The lack of career path can also cause staff to move elsewhere for growth. Other sources of agent dissatisfaction include lower than market pay and unachievable incentives.

Problems with organizational issues lead to not enough people to handle the workload and meet targets. Remember, the overall goal is to organize and staff as efficiently as possible to meet service level and other performance targets.

### APPLY BEST PRACTICES TO YOUR FRONT-LINE ORGANIZATION STRUCTURE

Best practices can help focus your assessment and the action plan to improve. Our best practice mantra for the front-line organization structure: *Your organizational structure provides the appropriate numbers and types of resources to achieve goals.* Include the following best practices as part of your assessment.

- Roles, responsibilities, and accountabilities within the center are clearly defined.
- The organizational design enables strategic planning and execution while also addressing the day-to-day demands of the operation.
- The organization offers appropriate opportunities for growth and development, and incentives, rewards, and recognition that motivate appropriate behavior and employee satisfaction.
- Sourcing and hiring approaches are effective and aligned with business goals, deliver appropriate staff levels with the proper skills, and optimize retention.
- 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.

### ASSESSING YOUR SUPPORT FUNCTIONS

We now shift our focus to the support functions that enable the front line to achieve its goals. Whether its supervisors wearing multiple hats in a small center, dedicated analysts in a support group, a smattering of IT and business liaisons, or some combination, these support functions can make or break the efficiency of a center and its ability to continuously improve.

#### DEFINING THE SCOPE OF THE ASSESSMENT

We define seven key areas when considering support functions. While the nature of these functions can vary greatly based on factors such as size, number of sites, type of business and business goals, culture, and other organizational roles and responsibilities, we believe any center should be able to point to these functions and know how they are supporting the center's operation. The functions are:

- Workforce Planning – forecasting, budgeting, and scheduling
- Command Center – real-time management
- Quality – quality monitoring and reporting, as well as customer satisfaction/voice of the customer
- Training – development and delivery of business and technical training, as well as soft skills training
- Process Optimization – analysts and designers to define and optimize processes (within the center and in their interactions with other areas)
- Reporting and Analytics – analysts for both business and operational reporting
- Technology Tools and Workflows – addressing routing, prompting, IVR self service, web integration, contact handling workflows, application of core tools (e.g., CRM, KM), and end-to-end workflows

As we consider these support functions, the critical questions in an assessment surround whether they are well defined, adequately staffed, coordinated, and consistently and effectively executed. The lack of any of these functions can sub-optimize a center. Even when present, to be truly effective, they must be choreographed into a dance that ensures the application of technology, use of valuable human resources, and execution of processes all work together to achieve the target outcomes.

#### SUPPORT FUNCTION ISSUES AND OPPORTUNITIES

In reviewing many centers over the years, some common themes emerge as deficiencies in support functions – or more positively spun, opportunities to improve. The first is the plain and simple lack of one or more of these critical functions. Even the smallest center needs some level of each of these functions to operate efficiently and effectively. We often see centers with little or no workforce planning or command center functions, haphazard quality assessments that occur "whenever we have time," and non-existent process reviews or improvements. So a key starting point is an inventory, and then definition of who is going to do what to provide the necessary functions to fill any gaps.

The training and technology tools roles are the most likely functions to reside outside the center, and that can be effective with the right collaboration, communication, and coordination between HR, IT, and the center. However, too often these groups are not well connected and the HR and IT functions have no accountability to the center or defined role in helping them achieve their goals. To be effective, the support functions must have accountability that aligns with the center, regardless of where they sit organizationally.

Most contact centers struggle to define exciting career path opportunities for staff, and support functions can be a ready target. However, these are not roles that any good CSR can grow into. These roles require an analytical mindset and proper training in the tools and processes they will use every day. Too often new staff are thrown into these "exciting new roles" and must find their own way through on the job training that is more often on the job learning. These roles are too important to leave to chance that the assigned staff member will figure it all out. Centers need to invest in careful placement (whether hiring outside resources or screening inside staff for promotions), formal training, and good mentoring to ensure the staff in these roles can truly succeed and add value.

A final opportunity to improve these support functions is to place the right tools in their hands – something we'll address in the next assessment series article when we talk about technology.

### **APPLY BEST PRACTICES TO YOUR SUPPORT FUNCTIONS**

Best practices bring focus to an assessment and the action plan for improvement. When looking at support processes, the goal is that processes are properly focused and designed, consistent with strategy. Here are some of the hallmarks of a best-in-class center that reflect the important role support functions play in optimizing operations:

- Processes for support functions are well defined, reinforced, and consistently executed –
- 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

Similarly, the goal with the support function organization is that *the organizational structure provides the appropriate numbers and types of resources to achieve goals*. So best-in-class centers have these characteristics in their support function organizational structures:

- Roles, responsibilities, and accountabilities for all support functions are clearly defined
- The organizational design enables strategic planning and execution while also addressing the day-to-day demands of the operation
- Sourcing and hiring approaches are effective and aligned with business goals
- Strategy, goals, and outcomes are clearly communicated across all levels of the organization

### **ASSESSING YOUR TECHNOLOGY**

Many centers have a love/hate relationship with their technology – always hoping for the next great thing that will transform their center, yet struggling with existing tools and each new project. An assessment can take a hard look at technology and find ways to get more out of what you have and pursue the right technologies, in the right ways, to ensure high value results.

#### **DEFINING THE SCOPE OF THE ASSESSMENT**

Here is a starter list for consideration in your technology assessment, looking at both what you have and what might fill gaps to meet business goals and requirements:

- Voice switching – PBX/ACD, including VoIP strategy
- Routing – Multisite and multimedia, including tying in home agents and outsourcers
- Computer Telephony Integration (CTI), which may include applications beyond "screen pops" such as desktop softphone, outbound dialing, and multimedia routing and reporting for a variety of media such as Email, text chat, and web collaboration
- IVR and the use of speech recognition for both prompting for authentication and call routing and Self Service



- Web self service and its integration to the center
- Customer Relationship Management, including contact management, scripting, workflows and potentially Knowledge Management
- The desktop configuration and usability, including access to all relevant applications
- Performance tools including: WFM, QM/call recording, reporting, analytics (data and speech), performance optimization tools such as scorecards or dashboards, eLearning and customer satisfaction surveys/Voice of the Customer
- Web 2.0/social media applications and integration

In addition to specific technologies, you'll need to assess architecture, applications, integration, sourcing, business continuity/resiliency and disaster recovery, support structures and processes, and more.

### TECHNOLOGY ISSUES AND OPPORTUNITIES

It's easy to find issues and opportunities when looking at the use of or need for technology. Many centers lack the right technology because they've never defined a coherent strategy and built the business case for what they really need. Others have the technology but deployed it for the wrong reasons. Too often the "justification" for a new system was really just that someone thought it was the next great thing or got enamored with a product or vendor, IT or another department unilaterally declared "this is what we're going to get," or relationships at high levels led to big purchases. Inevitably, these scenarios lead to poorly deployed or little used solutions, or situations in which the contact center has to make do with messy desktops and workarounds that impact performance and the customer experience.

Since it's not likely that you'll be able to re-write history, you might kick-start a better future by rectifying or avoiding these common pitfalls:

- Implementations where the "new" stuff gets put in to look just like the "old" stuff with the promise of taking advantage of all those new fangled capabilities later. Alas, later never seems to come and technology cynicism builds. *There is no time like the present!*
- Standalone applications where staff act as manual integration interfaces, performing time-consuming, unscalable, and error-prone tasks daily. *Keep your eyes peeled for instances in which data gets hauled into Excel for snazzy reports that no one else can replicate and few trust.*
- User interfaces that weren't really designed with users in mind – CSRs and customers. *Hint: Get feedback on your desktop applications and IVR.*

When it comes to the "who" of technology deployment, it's time to review and rethink sourcing. There are an abundance of options available – hosted, software as a service, managed services, on-demand, and even good old-fashioned premise-based – from an ever-increasing slew of vendors. Every center could benefit from understanding IT's strategic sourcing positions and coordinating with IT for a careful review with each technology decision. Every product and vendor choice leads to a relationship – for planning, deployment, use, and support – that can last many years and impact many facets of technology optimization.

### APPLY BEST PRACTICES TO YOUR TECHNOLOGY

Technology best practices make a strong stand for strategic alignment: the goal is simply *to put technology tools in place to enable the operation to serve its mission*. Mature organizations derive maximum technology value by applying these best practices:

- 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

## ASSESSING YOUR METRICS AND REPORTING

Since call centers have been around for decades, you might think that a section devoted to assessing metrics and reporting would be unnecessary. After all, every single piece of technology in the center spews out gobs of reports! In truth, the sheer quantity of data is mind-numbing. It's hard to zero in on the right metrics, package the data in a way that's useful, and produce information that leads to actionable and valuable outcomes. And it only gets worse as we add more media, technology and complexity to the center's operations. Here are some of the high (and low) points to get you started on your assessment.

### DEFINING THE SCOPE OF THE ASSESSMENT

Metrics and reporting is much more than Key Performance Indicators (KPIs) and the familiar set of real-time and historical reports produced by your ACD. It's the means through which you analyze business processes from end-to-end and measure the impact of your operations on customers, staff and the bottom line. As such, your metrics and reporting assessment must look at all media and all forms of contact – voice, voice mail, email, chat, IVR and web-based services. It might encompass links to outcomes in CRM, analytics, quality monitoring and customer satisfaction surveys. And it considers how contact center information is supplied to, and used by, the rest of the enterprise to measure the center's value as a strategic asset.

### COMMON METRICS ISSUES

We've encountered a common set of problems as we've worked with contact centers around the country. As I list them below, they'll probably get you nodding your head or chuckling with familiarity. The best practices listed at the end of this article provide remedies to these problems.

**Issue:** Metrics appear to be "plucked from the air" without a clear relationship to the underlying business model. Examples: An executive sets the bar for service levels without a staffing model that makes the target attainable. A benchmarking devotee chooses categories and targets based on "industry standards," disregarding the distinct nature of the center's business. Agents are rated based on "calls per hour" even though they don't control call volumes or overages/shortages in staff to support it.

**Issue:** Metrics focus internally and don't resonate outside the contact center. Example: The Contact Center executive wants to elevate the stature of the center among her peers, but all she can talk about is service level, AHT and abandon rate.

**Issue:** Managers select metrics or establish targets that produce detrimental behavior. Example: Agents get marching orders to reduce their AHT, which they dutifully do, but first call resolution, quality and customer satisfaction all suffer.

**Issue:** Management talks from both sides of its mouth. Examples: "We're very customer focused. We want to deliver the best service possible." Or: "We want our reps to talk to customers about our new products/services." But performance reviews are weighted heavily toward AHT.

**Issue:** The company purchases sophisticated analytics and scorecard tools but doesn't invest the time and energy to use them properly. Example: Management is all excited about the promised ROI they'll realize when the new tools go into effect. But they didn't plan for supervisor time or coaching methods to work with reps based on the results. And no one takes ownership for changing the dysfunctional processes, improving systems navigation or performance, or making adjustments to training in response to the tool's analytical insights. They wind up with more reports, not better results.

**Issue:** Home-grown spreadsheets and databases are the refuge for people with inadequate and/or misunderstood tools. Example: A small army manipulates data in complex spreadsheets; "Joe" creates the vital daily report. The custom reports and manual processes are hard to scale, create an atmosphere of distrust and the potential for errors – while being a very expensive way to generate useful information. Everyone worries about what will happen if Joe moves to Tahiti.

**Issue:** IT manages system reports and CC Operations manages people reports, but never the twain shall meet. Example: IT notices a drop in IVR performance and begins working to resolve it, while the center fails to meet its service level for the day through no fault of its own.

## APPLY BEST PRACTICES TO YOUR METRICS AND REPORTING

The key to success with metrics and reporting is to align the metrics with corporate and organizational accountabilities, define achievable metrics and ensure that they drive appropriate behavior. Use these best practices as you assess your metrics and reporting:

- Metrics are defined in support of the business goals, and accountability is well defined and aligned within the center and its support partners. Make sure IT is part of the equation and that proper lines of communication are in place.
- Everyone understands the goals and can achieve them. They have access to appropriate information to manage performance. Use benchmarking as one input, not the whole story.
- 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. [Note: You need the people, process, technology triumvirate to succeed with any performance tool.]
- Accountabilities are aligned, with senior staff focused on strategic goals while the staff in the trenches manages day-to-day operations.

## ASSESSING YOUR FACILITIES

Whether your contact center facility was purpose-built, redesigned, or you are making the most of what you have, you can optimize your plan for using any available facilities improvement budget through a focused assessment. Facilities are more than just space for people to handle calls, emails or chat. They are a critical tool to support business goals, ensure employee health and safety, optimize productivity and ideally attract and inspire agents.

### DEFINING THE SCOPE OF THE ASSESSMENT

When assessing your facilities, the scope can vary based on the age and condition of your facility, the contact center size and functions (agents and support staff), and the available improvement budget. We recommend you include the following categories in your assessment, at a minimum:

- Design/layout – for both call center teams and support/management functions to enable efficient communication, collaboration or quiet, as appropriate.
- Ergonomics – in agent work space including lighting, sound, chair and workspace design, chair to work surface alignment, access to drawers for personal possessions, and glare free monitors
- Location(s) – easy access to public transportation, abundant parking, and safe/secure access to the building
- Amenities – such as onsite day care, meal and snack options, fitness facilities or walking paths, and personal communication space and tools

Assessing and addressing each area enables call center management to attract and retain skilled agents, improve schedule adherence, bolster employee morale and ultimately improve customer satisfaction.

### FACILITIES ISSUES AND OPPORTUNITIES

There are five areas we most often see contact center managers target for improvement.

#### *Agent workstation Ergonomics*

Adjustable desktops, keyboard drawers which can raise or tuck away, and ergonomic chairs or balance balls for sitting are increasingly common, as is training focused on appropriate chair and work space alignment.

#### *Lighting is more than what you see*

Natural lighting through windows or skylights is ideal within the center. Centers located in the building interior can still get some of the benefits of a view to the outside world by posting large pictures of outdoor scenes and using special lighting to match the natural light spectrum. As an example, a large utility center altered lighting and found a positive impact on agent moods and energy.



#### *Collaboration*

In today's world, your first thought with collaboration may be technology, but facility layout can enhance collaboration, too. In a large center in the healthcare industry, teams worked in an open environment to optimize first call resolution. The open work space was bordered by meeting and collaboration rooms which ranged in size to support anything from special project team meetings to agent quality feedback and coaching.

#### *Fun break rooms*

Agent-focused break rooms offer more than coffee, a fridge and microwave. A top competitor for a Call Center of the Year award provides three separate areas adjacent to their break room. One room is for active entertainment with Foosball and ping pong tables. Another provides a quiet area with couches and bean bags for power naps or relaxation. A third room provides television, Internet access, and additional media capabilities. Creative break options result in inspired staff.

#### *Positive reinforcement*

Repurpose your walls into Customer Kudos Centers, Employee Appreciation Centers or consistent reminders of team mission and goals. One center with a mission to shift from a cost center to a profit center used their walls to rotate an executive statement of agent value with quarterly goals and monthly/quarterly performance winners. The successful change to a profit center was worth the investment in a few changes to wall design.

### **APPLY BEST PRACTICES TO YOUR FACILITIES AND PHYSICAL ENVIRONMENT**

While walls, cubes and desks may seem the most immovable of contact center resources, a little creative energy goes a long way in finding ways to optimize your facilities. Use these best practices to assess your facilities and physical environment and undoubtedly you'll find some improvements that are worth the investment.

- Sites are easily accessible to employees by public and private transportation, and ample, well lit parking is provided. Amenities (food, exercise facilities, daycare, etc.) are available on-site or nearby.
- The facility is well-maintained and ensures employee safety and security.
- Work areas reflect ergonomic design to promote teaming and resource management while avoiding disruptions.
- Staff has ready access to bathrooms, copiers, faxes, mail rooms, break rooms, etc. to minimize time away from their desks.
- Training, quality review, huddle and break areas provide ample room for employee education, coaching and development at convenient locations. Conference rooms and/or small offices support collaboration as needed.
- Appropriate space is provided for display of operational feedback and recognition.