Contact Center "Best Practices"

Contact center managers look to industry "best practices" as the reference points from which to evaluate their current operations and set targets for improvement initiatives. There is no single recipe for success, as each center must account for its distinct business context, goals, and cost and resource constraints. Nonetheless, we offer the following considerations based on observations of hundreds of centers from a broad cross-section of industries.

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

- The business strategy is clearly defined, communicated, and understood by staff
- The contact center's 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
- The 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 use of skills consider customers first while balancing the needs of the business and the center
- Processes are designed to ensure customer expectations are met, operations are efficient and effective, and technology is leveraged appropriately; 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
- The contact center uses a formal change management approach to ensure that process change is appropriately introduced, adopted, and reinforced among all affected parties

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 the support areas on which the center relies (e.g., IT, Marketing, HR, analysts)
- 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 with accompanying incentives, rewards, and recognition
- Sourcing and hiring approaches align 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

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

- Metrics support the business goals; accountabilities are well-defined for 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 contact 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 within the contact center hierarchy, 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 neither over- nor under-invested in technology given the role of the center in achieving business goals and the available human and financial resources
- Technology is properly applied to business needs with due consideration for the user experience (internal and external)
- The business, operations, and IT organizations work together to optimize technology – from planning through implementation and ongoing support
- Contact center technology solutions are consistent 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
- The architecture provides appropriate resiliency/redundancy, and IT/telecom has business continuity/disaster recovery plans
- IT has an effective means to monitor performance, detect failure conditions, resolve incidents, and restore service

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 (e.g., training, quality review, huddle, break rooms) 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