



Contact Center E³ Spectrums[®] – The Pursuit of Best Practices

Scorecard for Self-Assessment

Contact Centers are often interested in best practices and how they compare to others. Strategic Contact has extensive experience and insights based on working with many clients. We developed the Efficiency and Effectiveness Evolution (E³) Spectrums[®] to show how centers evolve as they pursue best practices across all aspects of strategy, operations, and technology.

Use this tool to rate your center in **16 categories**. The ratings focus on the center, while recognizing it is part of a broader ecosystem, interdependent with other parts of the organization. **Indicate one level – Basic, Good, Better, or Best – for each of the categories.** We've tried to keep the descriptions as concise and simple to understand as possible. We can't account for every nuance but hope you can find a description that best matches the situation for your center. You can place the outcome on a scorecard to consider *where you are* and help you think about *where you aspire to be* (see sample on last page). Keep notes about your rating to aid your discussions and planning efforts.

Questions? Need help? Contact Strategic Contact at 503-579-8560 or consult@strategiccontact.com

	DESCRIPTION	Rating – Check one per Category	Notes on Rating (to aid discussions and planning)
1. STRATEGY			
BASIC	Low appreciation of the CC role and value and little strategic focus; the CC does not have clear goals and struggles to secure adequate budget to deliver a good customer experience		
GOOD	CC role is recognized, however not all strategies (e.g., staffing, metrics, technology) are fully defined or aligned, resulting in unclear investment priorities and inadequate funding		
BETTER	CC's value and contributions are recognized and strategies are defined and aligned; the company budgets for staffing and technology to deliver the expected customer experience		
BEST	All CC strategies (e.g., ops, tech, sourcing, channels, metrics) are forward-looking and align with overall business goals; the CC's critical role is highly valued and sufficiently funded		

	DESCRIPTION	Rating – Check one per Category	Notes on Rating (to aid discussions and planning)
ORGANIZATION AND OPERATIONS			
2. ORGANIZATION – FRONTLINE			
BASIC	An unfocused hiring process tactically fills positions that lack clarity on role segmentation and career path; coaching is reactionary and focuses on issues		
GOOD	The staffing model considers multiple approaches to proactively fill positions with basic contact type differentiation but offers limited career growth opportunities; coaching is periodic (e.g., monthly) but easily preempted/not prioritized		
BETTER	A finely-tuned hiring and development strategy makes appropriate use of FT/PT, temps, home agents, and/or outsourcing, and uses skill assignments to optimize performance and offer career opportunities within the center; coaching is routine, balanced, and focuses on performance management and recognition		
BEST	Hiring, coaching, and development provides options for growth and advancement within the center and to other parts of the organization; coaching is routine, balanced, and enhances performance, staff development, and career progression		
3. ORGANIZATION – LEADERSHIP AND SUPPORT FUNCTIONS			
BASIC	Managers and supervisors juggle CC support duties along with a myriad of other responsibilities		
GOOD	Some dedicated CC support functions (e.g., WFM, Reporting & Analytics, or QM) while continuing to use managers and supervisors to fill gaps		
BETTER	Critical support functions are staffed with qualified individuals; supervisors focus on frontline coaching and development		
BEST	A highly skilled management and CC support team optimizes center performance and works collaboratively with other departments (e.g., back office, planning, analytics, marketing)		
4. OPERATIONS & PROCESSES			
BASIC	Manual processes rely heavily on “tribal knowledge” with limited focus on compliance, accountability, or optimization		
GOOD	Documented CC processes are consistent with business and operational goals, and CC leadership ensures compliance		

	DESCRIPTION	Rating – Check one per Category	Notes on Rating (to aid discussions and planning)
BETTER	CC business processes evolve in response to new products, services, and technologies; consistent workflows across channels enable efficient interaction handling; the CC support team pursues continuous improvement		
BEST	Subject matter experts optimize closed-loop processes and workflows across the enterprise and leverage formal change management methodologies when implementing timely updates and improvements; automated and/or intelligent workflows improve the customer experience and agent efficiency and compliance		
5. WORKFORCE MANAGEMENT			
BASIC	Manually generated forecasts based on limited historical data and projected growth result in ad hoc or block schedules with little adjustment to workload needs		
GOOD	Well-defined WFM processes use data to facilitate forecasting, scheduling and real-time management, primarily for voice		
BETTER	Formal approach to planning and real-time management across diverse media ensures accurate forecasting and scheduling and achievement of target KPIs		
BEST	Expert resources and processes optimize accuracy and planning (including long range business plans); leadership and WFM team work together to optimize shift bidding and assess “what if” scenarios		
6. QUALITY ASSURANCE			
BASIC	Quality assurance focuses on phone calls to assess contact handling, accuracy, process, and policy adherence (internal view) and provide agent-specific feedback		
GOOD	Quality assessments review voice calls and Voice of the Customer surveys (external view) to help the CC and enterprise improve the customer experience		
BETTER	Internal (QM) and external (VoC) assessments extend beyond voice into other channels, e.g., email, chat, text, social media		
BEST	Internal (QM) and external (VoC) assessments across all media are used with analytics to support strategic quality initiatives (e.g., improvement in training, systems, processes)		

	DESCRIPTION	Rating – Check one per Category	Notes on Rating (to aid discussions and planning)
7. TRAINING			
BASIC	Seasoned agents and/or supervisors provide on-the-job training based on limited product, process, and soft skill documentation		
GOOD	Shared trainers deliver a structured course of study covering key skills and knowledge requirements but provide limited follow-up or reinforcement		
BETTER	Dedicated trainers augment a well-documented training program with pre-training needs assessments and post-training skills validation and support to meet training-specific KPIs		
BEST	The CC integrates the training, QA, and coaching functions and delivers reinforcement and remediation training		
8. METRICS/KPIs			
BASIC	KPIs are few, undefined, imbalanced, and/or do not align with business goals; limited or no accountability and focus on voice		
GOOD	KPIs address key business goals for each channel and managers/supervisors actively monitor and manage to them		
BETTER	Balanced KPIs with some measured (targets defined) and others monitored for trends/anomalies; Scorecards and Dashboards provide role-specific accountability for all channels		
BEST	Role-specific KPIs recognize organizational interdependencies and encourage behaviors in the best interests of the enterprise, the contact center, and the customer		
9. FACILITIES			
BASIC	The facility is not CC-specific; lacks critical design features and offers limited parking, transportation, and/or onsite food		
GOOD	The facility supports basic CC requirements (e.g., nearby break and rest rooms, proper lighting, line of sight visibility) and makes adequate provision for parking and onsite food		
BETTER	The facility provides a well-designed cubicle layout, noise abatement, ergonomic desktops/chairs, and sufficient meeting, training, huddle, and break rooms		
BEST	The facility boasts “best in class” CC design and furnishings with a cafeteria, exercise facility, game room, internet café, and/or daycare on site or nearby		

	DESCRIPTION	Rating – Check one per Category	Notes on Rating (to aid discussions and planning)
TECHNOLOGY			
10. ARCHITECTURE/INFRASTRUCTURE			
BASIC	Site-specific solutions, no redundancy or Business Continuity/Disaster Recovery (BC/DR)		
GOOD	Disparate technology with extensive customization/integration and limited redundancy; reactionary approach to BC/DR		
BETTER	Common platform for all centers; includes redundancy; leverages technology suites, APIs, and/or connectors; defined BC/DR plan		
BEST	Resilient and agile infrastructure (including platforms and networks) based on clear sourcing strategy that is applied on an application-specific basis; proactively test BC/DR		
11. ROUTING			
BASIC	Voice call routing makes little or no use of caller information or skills; email routes manually		
GOOD	Skills-based routing uses call need (DNIS, prompts) to align contacts with resources; non-voice channels are handled manually or through siloed applications		
BETTER	Intelligent routing uses customer identification (e.g., ANI, prompts) to match contacts with the best available resources and pop screens; integrated routing enables effective management of all channels and use of resources		
BEST	Low level of effort to identify customer and need (e.g., speech, biometrics) and extensive use of data/context/history and automation to provide appropriate treatment and routing for all channels and optimize contact handling		
12. REPORTING & ANALYTICS			
BASIC	Standard ACD reports provide real-time and historical data for voice calls; managers and supervisors create customized reports using Excel or similar tool		
GOOD	Robust ACD tool provides data for various timeframes and customizable reports; separate tools provide reports for other media (e.g., email, chat, text)		
BETTER	Strong reporting for all media supports CC operational requirements as well as scorecards, dashboards, and cradle-to-grave/customer journey tracking for contacts and outcomes		

	DESCRIPTION	Rating – Check one per Category	Notes on Rating (to aid discussions and planning)
BEST	Sophisticated analytics tools consolidate data across media, enable drill down, and provide keen insights (e.g., root cause analysis) that lead to targeted action		
13. OTHER PERFORMANCE TOOLS			
BASIC	Workforce planning uses a basic Erlang calculator and/or Excel spreadsheet; QM uses basic recording or service observing		
GOOD	WFM tool provides forecasting and scheduling for voice; QM and VoC tools support quality assessments		
BETTER	Robust WFM, QM (including screen capture), and VoC tools address contacts across channels		
BEST	An integrated suite of performance management tools (e.g., Reporting, WFM, QM, VoC, Analytics, Scorecards) supports training, coaching, and process optimization initiatives		
14. SELF-SERVICE			
BASIC	Siloed self-service applications (e.g., Web, IVR, Mobile) with limited scope and sub-optimized user interfaces; limited data on customer use		
GOOD	Broad (and appropriate) applications and some tuning of user interface based on outcomes; pass data on call transfers from IVR		
BETTER	Coordinated applications for consistency in user experience; use detailed reporting on usage, success rates, opt outs, etc. to optimize; speech IVR; pass data from IVR and web when customer seeks assistance (calls, chat)		
BEST	Integration across channels (from IVR, Web, Mobile to center); frequent tuning and incorporation of new technology (e.g., artificial intelligence, virtual assistance/bots, etc.) to improve the customer experience and maximize self-service use		
15. AGENT DESKTOP			
BASIC	Agents use multiple, non-integrated applications to manage contact handling and search for information; no mechanism for follow-up on escalations, transfers		
GOOD	CRM (or equivalent functionality) provides customer profiles and contact history along with links to standalone knowledge resources; presence and IM support SME collaboration		

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BETTER	A sophisticated CRM, structured KM/wiki with search capabilities, and automated workflows ensure efficient transaction processing with follow-up, tracking, and reporting		
BEST	A unified agent desktop provides efficient access to critical customer data, history, workflows, knowledge sources, and process guidance to optimize contact handling		
16. TECHNOLOGY SUPPORT			
BASIC	Ad hoc, reactive approach to technology support relies on good people to sustain operations		
GOOD	Active vendor agreements and clearly defined roles, responsibilities, and processes provide effective problem resolution		
BETTER	Trained tech support resources leverage strong processes, tools, vendor Service Level Agreements (SLAs), and proactive monitoring and testing to optimize performance		
BEST	SLAs establish accountability between vendors, IT, and CC; proactive testing (including BC/DR), root cause analysis, and preventative action ensure stability, supportability, resiliency		

Scorecard – Sample

Category	Basic	Good	Better	Best
1. Strategy		X		
2. Organization – Frontline			X	
3. Organization – Leadership & Support Functions		X		
4. Operations & Processes		X		
5. Workforce Management	X			
6. Quality Assurance	X			
7. Training		X		
8. Metrics/KPIs		X		
9. Facilities			X	
10. Architecture/Infrastructure			X	
11. Routing		X		
12. Reporting & Analytics		X		
13. Other Performance Tools	X			
14. Self-Service			X	
15. Agent Desktop	X			
16. Technology Support		X		

Scorecard – Your Rating!

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1. Strategy				
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