

Contact Center Performance Management “Best Practices”

Performance management – a.k.a. Workforce Optimization or Performance Optimization – is a holistic approach to understanding the center’s performance for the sake of continuous improvement. It balances input and insights from workforce management (WFM), quality monitoring (QM), customer satisfaction surveys, eLearning, analytics, and dashboards/scorecards to identify opportunities for efficiency, effectiveness, and positive financial impact.

The following practices help contact centers realize the greatest value from their performance optimization initiatives.

Strategy: The organization has a plan for performance optimization that is consistent with its size, resources, willingness to invest, and capacity for change

- The contact center is clear on its role in achieving corporate objectives and narrates the performance optimization initiative within that context
- Adequate resources are available to support a comprehensive approach to performance management and uncover insights from the data
- The enterprise is committed to effecting change in business processes where gaps are revealed; cross-functional teams collaborate to solve problems that require end-to-end change
- The enterprise uses a formal change management program to increase the probability that its process, technology, and/or organizational adjustments will be successful
- The organization implements the elements of performance optimization methodically to ensure that it has the resources, organizational buy-in, and measurable value to succeed

Workforce Management: The contact center has the data, tools, and processes to generate accurate forecasts and schedules, staff for anticipated demand, and manage schedule adherence

- Forecasting algorithms make effective use of historical contact volumes and handle times, projected marketing initiatives, non-contact requirements (e.g., training, coaching), and agent profiles/skills to yield staff requirements by interval at the target service levels
- HR and Operations are apprised of requirements in sufficient time to adjust staffing levels
- Scheduling updates are frequent enough to address forecast changes and maintain service levels
- Front line management takes ownership for schedule adherence; agents understand the impact on service levels as well as customer and peer satisfaction
- Forecast versus actual analyses by interval supports continuous improvement in projections and schedules

Quality: The contact center uses internal and external assessment tools to ensure that the operation is tuned for delivery of high quality customer experiences

- QM recordings include call and screen capture to assess call handling skills and effectiveness in using systems and resources
- Customer feedback is obtained regularly through voice of the customer surveys; survey data is integrated with QM results

- Results are available within one business day for agent recognition, behavior modification, and/or issue escalation
- (Optional) speech analytics provides a deeper understanding of customer needs: why they call, what they consider a quality experience, what they say about competitors, how the company's product and services meet their needs, and what other products are of interest
- Quality analyses lead to continuous improvement in training, processes, applications development

Training: Performance gaps trigger immediate remedial action

- QM staff and/or supervisors identify training modules appropriate to the individual agents
- WFM schedules agent training via eLearning to address skill and/or knowledge deficiencies during off-peak hours
- Training assignments and completion dates are monitored and reinforced through the quality and coaching processes
- The training department schedules group sessions and/or makes adjustments to standard course curricula based on issues and trends that affect all agents

Analytics: Contact centers leverage structured and unstructured data to generate insights that lead to actionable improvements in the center

- Data integration and warehousing capabilities link contact center data (call statistics, quality scores, customer satisfaction, speech analytics) with applications metrics and business intelligence to get a complete understanding of customer needs, behaviors, and perceptions
- The center balances traditional customer contact metrics with business outcomes, giving due consideration to:
 - Productivity/efficiency
 - The quality of the customer experience
 - Financial impact (cost, revenue)
 - (Ideally) the employee experience
- Scorecards equip agents and supervisors for self-assessment by comparing key performance indicators (KPI) for the individual (or group) against the relevant peers, generally using visual indicators (e.g., red, yellow, green)
- Dashboards present insights and trend data from analytics for the center as a whole using real-time gauges, charts, and/or other visual indicators
- Business analytics assesses what is happening, why it is happening, and what will happen if trends continue, and guides decision making and planning based on "what if" scenarios

Technology: Analytics and performance tools are highly integrated

- IT and the contact center collaborate on designing an infrastructure that facilitates data access, consolidation, and integration across all performance management tools (see Figure 1)
- A cross-functional team defines the people, process, and technology implications of the performance management infrastructure and addresses any gaps in functionality that it entails
- The parties collaborate on the data integration plan, pilot phase, and implementation rollout to ensure that tools and processes are refined before placed into production
- Ongoing refinements to the tools and processes maximize the potential for gaining business value from the solution

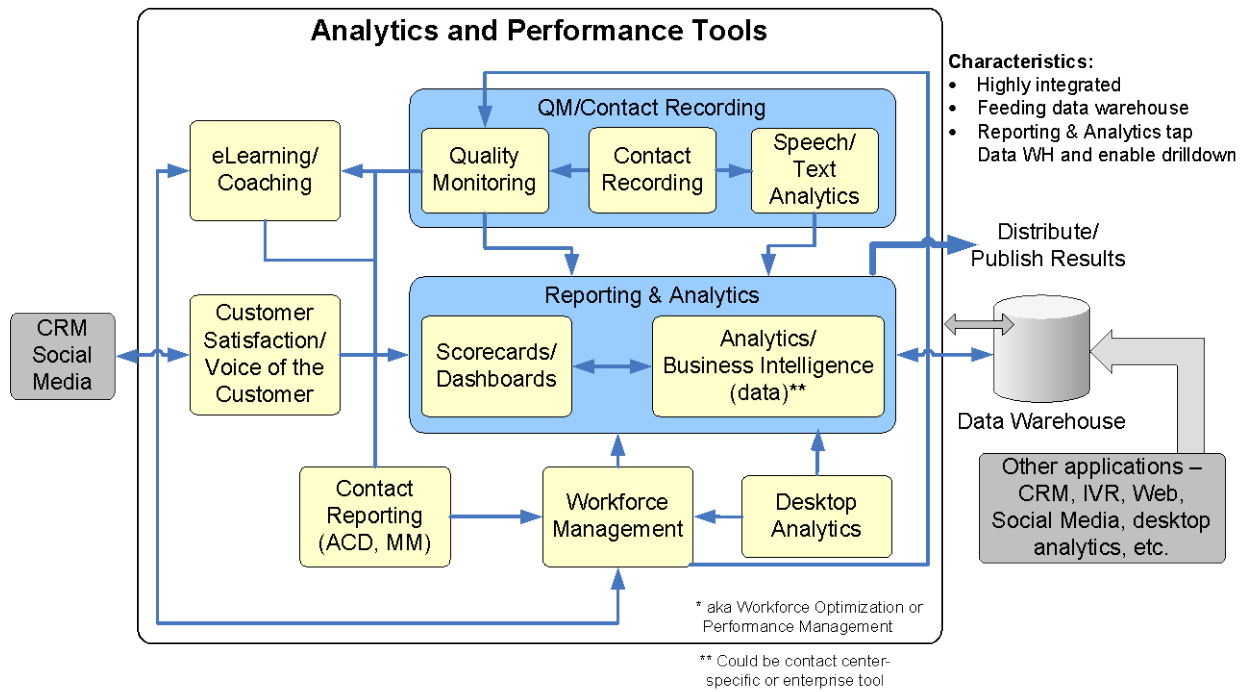


Figure 1: Performance Optimization Vision