

**10349 & 10353 Performance Standards in a Contact**

**Centre**

**Learner Guide**

NC: Contact Centre Support (SAQA ID: 71490),

NQF Level 2

NC: Contact Centre Support (SAQA ID: 71490 LP: 73269), NQF Level 2

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# Alignment to Unit Standards:

In this module you will complete the following unit standards:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **ID** | **Title** | **NQF Level** | **Credits** |
| Core | 10349 | Input data received onto appropriate computer packages within a Contact Centre | Level 2 | 12 |
| Core | 10353 | Meet Performance Standards within a Contact Centre | Level 2 | 6 |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Unit**  **Std ID No.** | **Unit Standard**  **Title** | **Specific Outcome** | **Ass** | **essment Criteria** | **NQF**  **Level &**  **Credits** |
| 10349 | Input data received onto appropriate computer packages within a Contact Centre | SO1:  Demonstrate and apply knowledge of computer packages within a Contact  Centre | 1.  2.  3.  4. | Knowledge of company specific computer packages is demonstrated  An understanding of company specific packages and applications is demonstrated and applied  Applications are accurately applied within company specific contexts  Confidence is displayed in company specific packages within a Contact Centre | 2 (8) |
| SO2:  Input data onto company specific packages within a Contact Centre | 1.  2.  3. | Data is inputted accurately  Data is inputted within company specific timeframes  Data captured is relevant and consistent with company specific formats and requirements. |
|  |  |  | 4. | Critical and closest routes are followed when inputting data onto packages |  |
|  |  |  | 5. | Tasks are completed within the company's specific timeframe |  |
|  |  | SO3:  Verify data onto company specific packages within a Contact Centre | 1.  2. | Data is verified against the source of information  Inaccuracies are identified and rectified correctly |  |
|  |  |  | 3. | Company specific follow up and close procedures are followed |  |

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|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Unit**  **Std ID No.** | **Unit Standard**  **Title** | **Specific Outcome** | **Assessment Criteria** | | **NQF**  **Level &**  **Credits** |
| 10353 | Meet  Performance Standards within a Contact Centre | SO1:  Use a computerised system | 1.  2.  3.  4.  5. | Relevant data is input accurately into specific Contact Centre packages  Data is retrieved accurately from specific Contact Centre packages  All logging procedures are correctly used as per company specific systems  All industry specific security and confidentiality requirements are complied with  Specific statistical data is understood.  RANGE: May include but not be limited to quantity, duration, wrap, hold and dropped Contacts | 4 (5) |
| SO2:  Respond to calls or other forms of communication  RANGE: Inbound or  outbound Assessment  Criteria | 1.  2.  3. | Company specific time targets are met. RANGE: May include but not be limited to quantity, duration, wrap, hold and dropped calls  The customer's requests are understood  Customer's requests are responded to according to company specific procedures. |
|  |  |  | 4. | Other forms of communication are considered and applied using standard industry practices.  RANGE: May include but not be limited to quantity, duration, wrap, hold and dropped Contacts |  |
|  |  |  | 5. | Answer calls according to company specific greeting |  |
|  |  |  | 6. | Close calls in accordance with the context of the call with a call centre |  |
|  |  |  | 7. Calls and customers are responded to in the appropriate language or medium | |  |
|  |  | SO3:  Follow-up customer queries | 1. Electronic communication systems are utilised effectively. RANGE: Includes but is not limited to faxing, e-mailing, printing, photocopying, telephone | |  |
| **Unit**  **Std ID No.** | **Unit Standard**  **Title** | **Specific Outcome** | **Assessment Criteria** | | **NQF**  **Level &**  **Credits** |
|  |  |  | 2. Manual administrative information is accurately completed as per company specific procedures and time frames | |  |

# Module 5: Performance Standards in a Contact Centre

## Unit Learning Outcomes

On completion of this module you will be covering the following Specific Outcomes which will enable you to:

* Demonstrating and applying knowledge of computer packages within a Contact Centre
* Inputting data onto company specific packages within a Contact Centre
* Verifying data onto company specific packages within a Contact Centre
* Use a computerized system
* Respond to calls or other forms of communication
* Follow up on customer queries

The only way a business can determine its success in terms of service is to measure its staff that deliver and provide services to the customer base. There are a variety of ways in which to measure performance and this module will be focusing on the aspects of data input and communicating with customers through the technology, systems and packages provided in a Contact Centre.



Before we start this Module – **write down** what your personal thoughts and objectives are when it comes to working with people and working in a team.

**Personal Objectives**

**What do you think you need to do in your job to meet performance standards?**

**Why is it important to know how all your computer systems and packages operate in your job?**

**What’s in it for me?**

# 

# Section 1: Data and the Contact Centre

## Specific Outcomes and Assessment Criteria

**Unit Standard: 10349**

**Specific Outcome 1: Demonstrate and apply knowledge of computer packages within a Contact Centre**

AC1: Knowledge of company specific computer packages is demonstrated.

AC2: An understanding of company specific packages and applications is demonstrated and applied.

AC3: Applications are accurately applied within company specific contexts.

AC4: Confidence is displayed in company specific packages within a Contact Centre

**Specific Outcome 2: Input data onto company specific packages within a Contact Centre** AC1: Data is inputted accurately.

AC2: Data is inputted within company specific timeframes.

AC3: Data captured is relevant and consistent with company specific formats and requirements.

AC4: Critical and closest routes are followed when inputting data onto packages. AC5: Tasks are completed within the company's specific timeframe.

**Specific Outcome 3: Verify data onto company specific packages within a Contact Centre** AC1: Data is verified against the source of information.

AC2: Inaccuracies are identified and rectified correctly.

AC3: Company specific follow up and close procedures are followed.

AC4: Critical and closest routes are followed when inputting data onto packages. AC5: Tasks are completed within the company's specific timeframe.

**Unit Standard: 10353**

**Specific Outcome 2: Respond to calls or other forms of communication** AC1: 1. Company specific time targets are met.

AC7: 7. Calls and customers are responded to in the appropriate language or medium.

**Specific Outcome 3: Follow-up customer queries**

AC2: Manual administrative information is accurately completed as per company specific procedures and time frames.

## Computer Packages and Programmes

(US10349, SO1, AC1)

The technology is the heart of any Contact Centre. When a Contact Centre is designed, technology will be the first most important factor, then would come the people element and the rest will follow. What would management take into consideration when setting up a Contact Centre and the technology required.

* The operation – what type of Contact Centre/medical/debt recovery/ technical etc
* The size of the Contact Centre
* The capacity of their system
* The number of operating Agents
* The server
* IT staff
* IT backup
* Operation – 24 hour or not

All the above factors will influence the type of system that needs to be introduced to the Contact Centre.

Then the actual operating system will be decided upon. What systems are they going to use.

There are several different aspects for using a computer in the Contact Centre:

* Different computer packages
* Training
* Capturing data
* Recording incoming and outgoing calls

Every company will use a unique product/package that suits their needs. They will either customize a package like a CRM – they would take the basics of this programme and build upon this to build a programme that suits the requirements of the Contact Centre. Most companies will use Microsoft as their base.

Let’s look at some examples:

* Debt recovery contact centres will use a system that allows their agents to look at their clients account information and direct dial individuals who have not paid their accounts.
* Insurance contact centres systems include a database that allows direct dialing. The system will then prompt the agent with specific information and questions that the agent would have to ask. Due to the Financial Advisory Intermediary Services (FAIS) Act there is legal compliance required and is therefore very important that the system assist the agent to make sure that all the legalities are covered and explained to the agent.
* General queries/Inbound contact centre system would assist the agent in searching for customer details, updating information, adding notes and general information that could assist the agent in providing quality service

All agents will have to know how to use the company packages.

Please complete your assessment for **Activity 1 in your Portfolio of Evidence**



## In-House Computer Systems Training

(US10349, SO1)

Every Contact Centre will offer in-house training and this training will be directed at the use of the package you have just indicated. This training normally takes place within the first few days of you being employed in the Contact Centre. This training will include the basic skills for each Agent and give him/her the tools to operate efficiently and according to company procedure.

Before an agent starts on the floor, they would go through training on the company’s specific systems. Training would include:

* Information on general aspects of the organization and how the system is used in the organization.
* How the computer system is accessed, updated and records information.
* Where to get support if the system is not working affectively
* Where to access sales, service or call statistics to track own performance
* Prompts or scripts included in the system to assist the agent when providing information to customers.

In addition training can also include keyboard training. Your Contact Centre might have a keyboard training programme that tracks your typing skills, this will monitor how many words per minute you type, how many mistakes you make. An average profession typist will reach between 50 and 70 words per minute but some positions will require 80 – 95 words per minutes. According to Wikipedia the fastest typist was last recorded in 1946 having typed 216 words per minute.

Typing skills are important due to the fact that the agent would have to input information or take notes whilst the customer is talking. It is very important that all information is inputted accurately and within the company specified timeframes.

To improve your typing skills you need to practice when you get a chance on the package that records and monitors your progress. Make sure that you do this daily it will assist you in being more capable in your day to day activity in the Contact Centre.

# Please complete your assessment for Activity 2 in your Portfolio of Evidence

## Applying & Using Computer Packages & Programmes

(US10349, SO1, SO2, SO3)

Note: The information contained in this section will give you an overview and understanding of essential aspects related to computer packages, inputting data, and verifying data. You will be required to learn the computer packages, programmes or systems relevant to your company and your department.

Now that you have identified and brainstormed the various uses of the Computer programme that is used within your Contact Centre, let us look at the importance of this package.

Computer packages are designed to verify customer details, query information, obtain further information, store information and use the fields in the package to prompt the conversation and capture the information received. The package is also there to collate results of the Contact Centre and report back to management.

Because as an Agent you are required to work efficiently and quickly the initial training on the package must teach you all the necessary steps that you are required to make when making or taking calls and this can include

**shortcuts** that you can used to speed up the process and make sure that although you are using **shortcuts** you are not compromising on the end result. What are **shortcuts**? **Shortcuts** are keys that you can use on your keyboard that will maybe copy and paste information, jump to another field and there could be many more. If you are taught these shortcut keys keep a list next to your computer until you have remembered them all as they are there to assist you in the efficiency of capturing information into the package.

Think about: What are the various tasks we complete when we are taking or making a call?

## Loggin On

Before you can use the computer programme you would need to log onto the system. It is

important that you check the company procedure on logging onto the system. This is a security feature. Your username and password should be secret, most companies require you to verify information by using your username (insurance companies require the agent to use their specific coded username to update or change information.).

Most contact centres have software that monitors performance and therefore logging in activiates the software. Generally if agents need a coffee break, or a rest room break they are required to log out and then log back on their return.

## Inputting Data

(US10353, SO1, AC3)

The input of data according to the required fields are very important that you as an Agent follow the required fields, ask the appropriate questions and input the data efficiently and correctly as possible. ID numbers, names, addresses all have to be accurate especially if you are dealing with a customer’s account details .

Confidentiality:

All information that the agent is privy to when talking to customers, inputting or recalling information is confidential. The industry standard is that no information can be shared with a third party or individuals that are not employed by the company.

In South Africa identity theft and fraud is high and therefore customer information should be protected.

## Recording Data

This is the same as inputting data – we record the data onto the system. When we have completed a call to a client we will make sure that we have inputted or recorded all the necessary data and then save the record. Recording data is to enable us to retrieve this information again should we need to and also to build a customer profile. In additon where customers query service or products it is important that we also update their records with notes, this is especially useful in the sales environment. Notes on customers can assist a sales agent in tailoring their presentation to meet the customer personality type and needs effectively.

## Customer Profiles

A customer profile is a record of information that you have recorded or inputted into the system/package of the customer. Every time you interact with the same customer this information is captured to the customer profile which means that when you access the customer profile, every interaction is recorded and any Agent can then be professional and answer the customer by referring back to previous conversations. Some packages allow you to filter the information – you can put in a query and it will only bring up specific information and all other information will be disregarded (ignored).

## Verifying Data

Another application of applying computer packages and inputting data is one of verification. Various Contact Centres will, and also in debt collection Contact Centres, the information of the Debtor or Customer will already be uploaded onto the system from their CRM system or master customer database. From this information the Agent will start the process of verification (i.e. double checking details for accuracy and to make sure the details are correct):

* Name
* Surname
* Address
* Contact Details
* Employer
* Identity Number

Once the critical fields are all verified the Contact Centre agent will then continue to elicit/retrieve other information which will be captured to the system.

Customer/Clients need to verify their details before an Agent can progress to the next step. In many cases, in the world where fraud and identity theft is a common occurrence, this is a required security step for customers to accurately verify themselves and their information before they can access the services of the agent and Contact Centre. A great example of this would be banking Contact Centres where key personal questions are also asked to verify the customer and data.

We have covered how to respond, gather and capture information as well as communicate with customers in detail in earlier modules of learning (Communication Skills, Dealing with Customers, Collecting and Recording and Problem Solving in a Contact Centre). You are encouraged to refresh this knowledge if you are unsure of any aspects discussed here

# Section 2: Meeting Performance Standards

**Unit Standard: 10353**

**Specific Outcome 1: Use a computerised system**

AC1: Relevant data is input accurately into specific Contact Centre packages.

AC2: Data is retrieved accurately from specific Contact Centre packages.

AC3: All logging procedures are correctly used as per company specific systems.

AC4: All industry specific security and confidentiality requirements are complied with.

AC5: Specific statistical data is understood. RANGE: May include but not be limited to quantity, duration, wrap, hold and dropped Contacts.

**Specific Outcome 2: Respond to calls or other forms of communication** AC1: 1. Company specific time targets are met.

AC2: 2. The customer's requests are understood.

AC3: 3. Customer's requests are responded to according to company specific procedures.

AC4: 4. Other forms of communication are considered and applied using standard industry practices.

AC5: 5. Answer calls according to company specific greeting.

AC6: 6. Close calls in accordance with the context of the call with a call centre.

AC7: 7. Calls and customers are responded to in the appropriate language or medium.

**Specific Outcome 3: Follow-up customer queries**

AC1: Electronic communication systems are utilised effectively.

AC2: Manual administrative information is accurately completed as per company specific procedures and time frames.

## Meeting Performance Standards

At all times it is imperative that a Contact Centre Agent meets the performance standards within a Contact Centre.

**Why is it important?** The reason for this is if the Agent does not meet the performance standards, the Contact Centre will not be operating effectively.

## What is Optimal Performance?

We can identify three main components that make up optimal performance. They are:

**Motivation:** this is defined as the behaviour displayed that is directed to a goal. It is recommended that you find out what drives your people as this will determine their success.

**Skill:** is the ability to do a job and refers to what a person is able to show and do in their job role.

**Opportunity:** this is external to the individual and involves opportunities for further growth within the business.

It is important as a team leader to develop an understanding of your team and how best to manage them.

## Performance and Non-Performance in a Contact Centre

Without targets, standards and procedures, a contact centre will never be able to peform effectively as the agents wouldn’t know what they are performing towards/what needs to be achieved.

In many cases, such standards and procedures exist (we covered in this in detail in your other modules of learning – Dealing with Customers and Collecting Recording and Problem Solving in a Contact Centre) and it can be found that agents don’t perform and/or meet the standard. This negatively impacts performance and is call non-performance.

Examples of such non-performance from a customer’s perspective include:

* Operators working from a script
* Non-expert operators (call screening)
* Incompetent or untrained operators incapable of processing customers' requests effectively
* Overseas location, with language and accent problems
* Touch tone menu systems and automated queuing systems
* Excessive waiting times to be connected to an operator
* Complaints that departments of companies do not engage in communication with one another
* Deceit over location of call centre (such as allocating overseas workers false English names)
* Requiring the caller to repeat the same information multiple times

Examples of such non-performance from a contact centre agent’s perspective include:

* Close scrutiny by management (e.g. frequent random call monitoring)
* Low compensation (pay and bonuses)
* Restrictive working practices (some operators are required to follow a pre-written script)
* High stress: a common problem associated with front-end jobs where employees deal directly with customers
* Repetitive job task
* Poor working conditions (e.g. poor facilities, poor maintenance and cleaning, cramped working conditions, management interference, lack of privacy and noisy)
* Impaired vision and hearing problems
* Rude and abusive customers

The experience a customer gets and the results a company achieves on a given call are almost **totally dependent on the quality of the agent answering that call and managing the information** (capturing data, using the system and giving feedback).

## Using a Computerised System

One of the requirements for an Agent to be successful in the Contact Centre industry, besides having good communication skills an Agent needs to be computer literate.

You will be taught by the Company the computer package that drives the Contact Centre as discussed in the previous Unit.

Throughout your career as an Agent you will be monitored on the use of the computer system, you need to understand the system and if you do not understand you need to ensure that you get assistance.

We have covered how to respond and communicate with customers in relation to the systems and technologies used in a contact centre (Collecting and Recording and Problem Solving in a Contact Centre). You are encouraged to refresh this knowledge if you are unsure of any aspects discussed here.

## Responding to Calls and Other Forms of Communication

US10353 SO2

Contact Centre’s are used by many large organisations to improve the communication between themselves and their customer, and by this we mean that it is vital that the most effective means of communication is used and the right Agent is there to drive the process. The different methods that can be used are:

* Fax
* Email
* Automated email response
* SMS
* Web chat
* Voice

Contact Centre’s that use **voice** only in many cases do not meet their customer’s needs.

A top notch Contact Centre will have a system that has the capability to deliver the Customers query to the right Agent and this happens through an **interactive** **voice** recorded message system which allows the customer makes the necessary choice.

This is not always the ideal as Customers do not like speaking to ‘**a** **voice’** but in terms of company efficiency it is an ideal situation as it assists with the flow of incoming calls into the Contact Centre and the system will direct the calls to the correct Agent. Therefore, when a system is chosen to respond to customers through a **voice** system, it must be brief and not give the customer too many options to choose from and there **should always** be the option of being referred to an Agent.

In terms of responding and following up with customers, remember we have covered **key communication skills** (active listening skills, asking questions, eliciting and offering information, establishing rapport) and **customer service techniques** in other modules of learning. It is important that you know that these will also apply in how you operate your systems and programmes as this, along with how you communicate with others will always be measured in your performance of your daily work tasks.

Always remember that calls, e mails, letters etc. should be responded to within the company specific procedures and timeframes.

We have covered how to respond and communicate with customers in detail in earlier modules of learning

(Communication Skills, Dealing with Customers, Collecting and Recording and Problem Solving in a Contact Centre). You are encouraged to refresh this knowledge if you are unsure of any aspects discussed here.

Language:

It is VERY important that you know what the company policy and procedure is regarding language. We have 11 official languages in South Africa and unfortunately contact centres can’t accommodate all of the languages. Where contact centres deal with legal points related to National Credit Act and FIAS , some contact centres are specific that terms and conditions or legal clauses are to be spoken in English and followed up in the customers language. Check with your team leader what the quality standards are and guidelines, after all the customer is king and should have a choice to speak in their own language where appropriate.

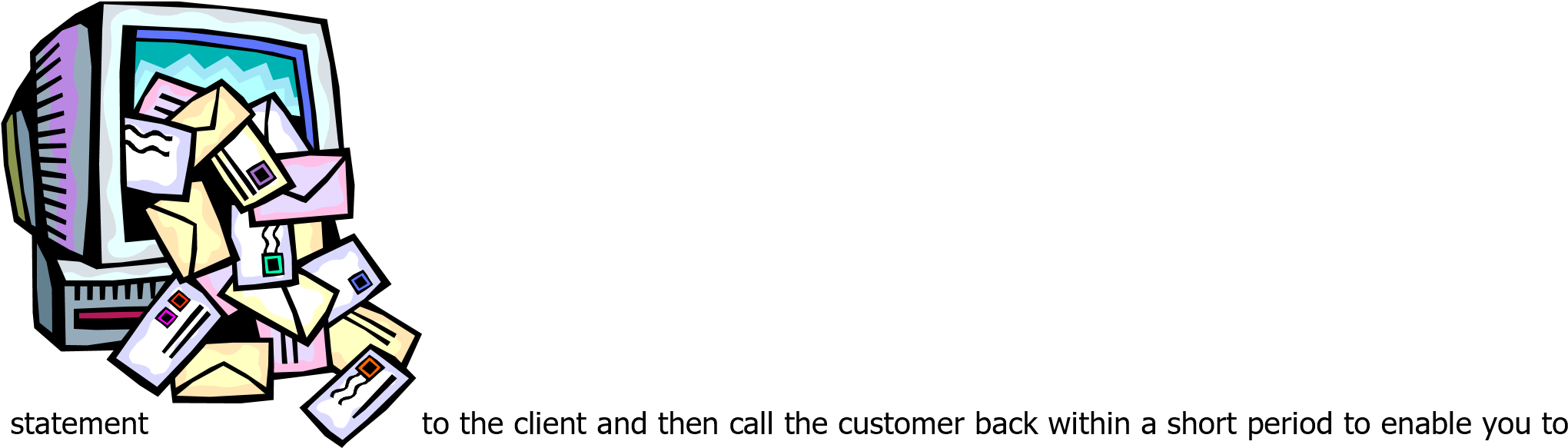
## Fax and Email

Most Contact Centre will only use this method if the Agent is able to communicate efficiently or if it means that only data is going to be transmitted.

A fax, letter or email that is badly written can be the downfall of any company.

Written communication skills have to be 100% before an Agent will be allowed to use these methods of communication.

Where a Contact Centre does not offer this service, it is frustrating for a client.

For example if you have to communicate with the client regarding his/her statement of account, it would be preferable if you are able to email or fax the to the client and then call the customer back within a short period to enable you to

discuss and resolve the problem effectively.

Because this facility is not available in some packages, the Agent will be instructed to advise a specific department who will then fax or email the statement to the customer. In some instance this can cause a two to three day delay in resolving the problem.

Most companies have standard procedures when it comes to faxing and emailing and these procedures should be clearly understood and followed.

We have covered communication methods and written communication detail in earlier modules of learning (Communication Skills, Collecting and Recording and Problem Solving in a Contact Centre). You are encouraged to refresh this knowledge if you are unsure of any aspects discussed here.

## Specialised Packages

Because it can be a complex (difficult) for management to manage a service where different methods of communication are used, there are specific packages available that could be added to the Contact Centre operations that will manage this process. Although the package will assist in the execution of the different communication methods the Contact Centre has to ensure that the media that the Agent uses is of a nature that is acceptable to their Client. A customer that receives a badly written email or fax message, full of spelling mistakes, bad grammar and does not address the problem will cause more problems for the Contact Centre, thus the reason why the Contact Centre would prefer to leave other methods to a specific department where they are able to control all outgoing methods of correspondence other than a voice message.

# Please complete your assessment for Activity 3 & 4 in your Portfolio of Evidence

# Section 3: Articles of Interest

## The best KPIs to use in your call centre



We’ve been doing a lot of writing and speaking about metrics in the contact centre. So we asked a number experts which key performance indicators (KPIs) should be used in the contact centre.

**Wow… this is one of those open-ended questions that might never have an ending** Now, assuming we’re talking about an inbound centre, there are some of what I call the “classic” measurements. These will help capture the internal workings and productivity measurements

of the centre such as:

* Occupancy, expressed as a percentage – This helps identify how much time an agent is actually “speaking live” to your customers. As a rule, the higher the percentage, the better, but be careful it isn’t too high. Unless you’re in a highly specialised role (directory enquiries services spring to mind) too high a number might indicate either a lack of attention to after-call work, or an inaccurate measurement.
* Abandoned calls – pretty self explanatory and naturally, the lower the better
* Calls answered
* Calls offered
* Average wait time
* Grade of service (number of calls answered within x seconds)

Pretty simple so far. But this is also where it starts to deviate depending on the role of the contact centre. For sales-driven environments, There will be much higher emphasis on the average wait time compared to, say, a support or service line. There are also a number of other KPIs that will be important to any sales organisation, such as:

* Conversion – The ratio of calls to closed business (or appointments, or promises to pay, whatever your centre’s goals are). This can calculated through a simple result code that your agent can key into their ACD phone, assuming your ACD supports this).
* Average call length – Depending on what you’re selling, this can vary greatly, and there are no right or wrong answers to it. For example, someone selling a mortgage product will be permitted a much longer average call length than someone who places orders from a mail-order catalogue.

For operations that are more customer service or resolution based – you could consider KPIs which will help interpret the level of customer satisfaction with the call. These could include:

* First call resolution (%) – Being able to resolve the customer’s query/concern on the first call made. A nirvana for most customer service centres, but much more difficult to achieve in real life.
* Average age of query – Failing to resolve the query on the first call, this metric calculates the average amount of time that a case remains open. Naturally, the shorter the better. And most organisations should be able to have the reporting capabilities to track/trend this.

•

* Customer call frequency – A metric to indicate the frequency of repeated calls from the same customer. This helps identify if correct information was given in the first place, or if there are repeated issues with a particular element of your business.

These terms are a bit generic, and many business will use their own jargon or acronyms to describe some of these concepts. There are lots of others that can be applied to other more specific operations too.

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Contact centres are at the heart of the customer experience and as such are under constant scrutiny from the public and the industry to provide a consistently high level of service. It is commonly acknowledged that the sustainable differentiator between companies is now the level of service they provide and the subsequent impression left with the customer when each call ends.

As such the performance measurement criteria used by a contact centre should complement and not conflict each other in order to achieve a successful level of service.

**The business objectives**

Organisations need to be clear as to what their overall objective is in order to establish what they are looking to achieve as a business, whether this be maximising profits, maintaining high levels of customer satisfaction, recruiting new talent, driving new business or all of these things.

Managers can then create and execute successful plans for each area of the goal. However, if a brand fails to consider its intentions at the start of a project, it is in danger of potentially skewing one set of results which could be detrimental to another.

**Customer satisfaction surveys**

To understand whether a contact centre is developing in the right direction, it is essential to use some form of customer satisfaction survey. A CSAT Index, for example, can be simply implemented to measure customer satisfaction and loyalty.

The survey method can help to reduce the complexity of implementation and analysis frequently associated with measures of customer satisfaction. In turn, this provides a stable measure of business performance that can be compared across business units.

**Customer advocacy**

Another critical factor is pro-actively assessing customer advocacy and word-of-mouth feedback by looking at whether existing customers are talking about the services and products on offer. Brands should be continually looking for new ways to elevate their service not only to ensure repeat business from customers but to activate the spread of the business name through word of mouth.

**Start measuring Twitter**

The internet has given consumers the ability to express their opinions on an easily accessible platform where they can openly applaud or criticise a brand and its service. Word of mouth online can work in two ways; negative comments posted on review sites or Twitter can be read by thousands of people and become a deciding factor in brand or product choice. Conversely, a satisfied customer can pass on positive comments which have a considerable impact on a brand in terms of generating new custom and increasing profit.

**First-contact resolution**

To drive customer satisfaction there should be a clear definition of first-contact resolution and the opportunity to provide customers with better processes in response to their needs. It is essential for managers to look at how efficient their contact centre’s current processes are by identifying any existing weaknesses in first-contact resolution. A focus on speed of delivery can often mean contact centre agents have far less interaction with customers which can result in them feeling less valued and can remove the personal aspect from conversations. In order to monitor first-contact resolution effectively, contact centres can use automated technologies but in the initial stages agents should be trained to handle situations without any props. To do this, agents should be briefed on the detailed processes that will solve customer problems efficiently and appropriately. Managers must ensure that customer’s satisfaction levels remain high by establishing a timeframe to monitor customer requests and track progress. Through this approach, contact centres can save money and essentially avoid losing customers.

**Customer lifetime value**

For contact centres, an essential indicator of performance would be one which considers the value of the brand to the consumer. This can be analysed by looking at how many products a customer has purchased from that organisation and the value that this relationship has generated.

To fully understand a consumer’s affinity to a brand, a contact centre must distinguish whether the customer is heavily engaged and happy with the service being provided. In theory, customer lifetime value represents exactly how much each customer is worth in monetary terms, and therefore how much a brand should be spending to acquire and retain them as a loyal customer. Those customers which are defined as giving greater lifetime value can be maintained with approaches tailored to them.

**Employee turnover**

It is essential to provide a positive working environment in the contact centre, recognising and rewarding each individual’s efforts. Agents should feel they can openly contribute and are supported when exchanging ideas during day-to-day activity.

To achieve this, it is essential to evaluate and measure turnover, employee satisfaction, employee attitudes, and management effectiveness continuously in order to develop the potential of the workforce.

**Call centre effectiveness**

It is equally important to look at hard, quantitative measures of call centre effectiveness. This can be done by looking at how quickly agents are able to resolve calls and the ability to build rapport whilst gaining additional insight and data. Encouraging a customer to impart any information, especially in light of the somewhat negative view the media has placed on the use of personal data, can be a challenge for agents, but will enrich the customer service experience. But a warm, personable, individual and interested conversation can overcome this and an agent who is able to do this well can open up opportunities for subtle cross- and up selling, generating more income for the organisation.

Chris Hancock is the MD of GasboxDMG (www.gasboxdmg.com)

A call centre measurement framework must be simple, relevant to the particular call centre business and provide a balanced and comprehensive view.

Any balanced scorecard should include the following measures:

* Customer Satisfaction (How well am I serving my customers?)
* Operational Efficiency (How well is my operation performing?)
* Business Value (How well am I supporting business sales?)
* People Management (Am I getting the best out of my people?).

If we take the balanced scorecard measures one by one, the essential KPIs are:

1. **Customer Satisfaction**

Percentage of Calls Abandoned, Answered and Average Speed to Answer are the basic hard measures underpinning customer satisfaction. Internally, they can reveal suboptimal shift patterns or agent scheduling; externally long wait times means frustrated customers keen to take their business elsewhere.

First-Contact Resolution rate is vital for customers who rightly resent being put on hold or passed through different departments. A low FCR can indicate poor internal processes or inadequate staff training.

Customer Satisfaction Scores provide direct feedback from the people who count; the customers. Take it seriously and don’t resort to email feedback surveys as your only data-gathering mechanism.

1. **Operational Efficiency**

Agent Occupancy describes how long the agent spends answering or dealing directly with calls. Low occupancy can indicate overstaffing and high operational costs.

Average Handling Time measures the time agents spend handling individual calls. Long times can reveal inadequately skilled agents or broken processes and tools.

Call Transfer Rate tells you if calls are being routed to the right agent first time or whether too many are being redirected thus wasting agents’ time.

Cost Per Call takes into account all fixed and variable costs expended in running the contact centre operation and provides an overall gauge of efficiency when compared with similar operations.

1. **Business Value**

Total Sales directly measures the revenue contribution of the contact centre. Linked to the correctly aligned reward structure it can drive effective agent behaviour.

Sales Conversion should be used in conjunction with Total Sales to make sure that quality leads are being converted.

Customer Retention determines whether the contact centre is exploiting its “front line” opportunity to nurture and retain customers and lock in future profits for the organisation. This is just as true for service-related contact centres as for those with a sales bias.

1. **People Management**

Attrition Rate is a lagging indicator often influenced by the local and national economy. High attrition means high recruitment and training costs, lower average skills and a more costly operation offering a worse service.

Unapproved Absenteeism literally measures the health of the contact centre and is closely related to Attrition Rate.

Agent Quality enables contact centre management to take a holistic view of agent performance and moderate the hard measures of agent performance which individually may give an unduly biased view of an agent’s performance, for example.

Paul Gardner is an Associate Director at Xantus Consulting (www.xantus.co.uk)

Everyone is familiar with the classic contact centre performance report – it’s all about numbers: how many calls were received, how quickly they were answered and how long they lasted. There’s a lot of focus on statistics, and we probably only use them because that’s the format that our ACD equipment generates.

But the problem with average statistics is that they often lead to average performance levels. As a result, contact centres can get locked into quantitative assessments that don’t always offer up the kind of insight needed to move an operation forward. This means that managers aren’t spending enough time asking more critical questions. By concentrating on averages they are effectively hiding the performance variants that might help them to improve key factors such as overall customer service quality or agent adherence.

**Identifying more granular metrics**

That’s why we think that contact centres need to start looking for more granular metrics and KPIs that will allow them to identify performance exceptions. This can help shift the focus towards more meaningful measures such as quality scores based on a sample of calls. Once these types of metrics become established, organisations can start to use exception-based reporting to build balanced scorecards featuring essential KPIs such as first-contact resolution and customer feedback.

Once the core operational metrics are in place, it’s also possible for contact centre managers to apply the same approach to other key parts of their operation, including customer contact history, self-service, customer feedback and agent classification. The ultimate goal would be to have a record of all contacts and self-service interactions stored within the customer record.

Customer feedback data can also play an important role in providing an external counterbalance to internally generated records. You can start the process with quarterly customer satisfaction surveys, and progress towards post interaction surveys across all channels.

It’s also important to gather data from the agents. It’s surprising how many contact centres don’t actually log post-contact classification data around the reasons for a customer’s contact and its outcome. Automating the agent’s entry into the customer record can provide managers with an element of real-time reporting, and provides the ability to carry out ad hoc queries to establish the reasons for current contact volumes.

There’s no point collecting all this data unless you do something with it. Regular automated reports that feature a balanced spread of service metrics can be broadcast to stakeholders at regular intervals, while more advanced reporting processes can use analysis and reporting tools to allow more complex queries to be made.

**They say you are what you measure**

We believe that if you limit your performance measurement and KPIs to the most basic record keeping and reporting, then you’re probably going to the limit the overall potential of your contact centre operation.

A business that makes sure its agents are performing efficiently, that takes note of what its customers are calling about, that asks them for their feedback, pays attention to how their brand is being discussed on social networks, and actively measures their customers’ propensity to recommend their service to others (using Net Promoter Scores), is much more likely to be getting things right.

The right measurements really can make a difference.

Kenneth Hitchen, Director, Sabio Consulting (www.sabio.co.uk)

**Too many companies stick to standard metrics**

In seven years of research into call centre performance management, I have placed a lot of emphasis on what KPIs companies should use to monitor and assess the performance of their centres. However, I have found companies pretty much stick to standard metrics such as queue lengths, volume of calls, average call handling times, holds, transfers, etc.

To improve, I advocate that companies think in terms of categories of metrics (operational, agent, customer), types of metrics (efficiency, effectiveness, root-cause), and currency of metrics (historic, real-time, predictive). Whilst doing this, companies will have to address the state, quantity and types of data they will need to access and what technologies are available to support this transformation.

**Categories of metrics**

The metrics currently used by most centres fall into what I term operational metrics. These mostly relate to how the technology is performing and the throughput of the centre. They are almost entirely about efficiency and don’t say much about how successfully the centre is performing at delivering business objectives. They link very closely with cost and as such will always be an important part of any centre’s KPIs. However, centres are not just about efficiency of operations, they also concern people – agents and customers. When it comes to agents, most companies rely on their quality monitoring processes to allocate agents a quality score and to identify what training they require. More advanced companies use technologies such as speech analytics to identify what their agents are saying, how they are satisfying customers and how well they are performing at solving customer issues.

Advanced companies are linking these metrics to call routing so that calls are routed to the agent most likely to achieve the best outcome from any one call.

They also look at root-cause analysis to understand why calls are occurring and why the outcomes are what they are. This will enable companies to address these root causes, which is likely to have a far more dramatic impact on call volumes and average handling times than focusing on pure operational efficiency metrics.

**Data sources**

The type, currency, validity, volume, quality, etc. of any set of KPIs depends on two things – the data they are based on and the technology used to derive the metrics from the data.

A study I did in 2009 showed that companies have, for example, customer data in 22 different types of systems, everything from network control databases, CTI systems, to applications such as CRM, ERP, billing systems, knowledge databases, and of course spreadsheets. To these, companies have to add unstructured data such as emails, letters, forms, surveys, call recordings, web scripts, IVR usage, IM scripts, text messages, blogs, tweets and videos. In fact, there are if anything more unstructured sources than structured.

The good news is that vendors are rising to the challenge. There are now customer data management vendors that support the creation and maintenance of high-quality data sources, vendors that can access every form of data, and vendors that can access data inside and outside the firewall.

Richard J Snow is VP and Research Director at Ventana Research (www.ventanaresearch.com*)*

Please complete your assessment for

**Activity 5 in your Portfolio of Evidence**